Canada – British Columbia

TIDSA

Travel Industry Development Subsidiary [illegible]eement

Pacific Rim Tourism Development Strategy

FINAL REPORT

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Pacific Rim Tourism Development Strategy

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STEERING COMMITTEE

The study was directed by a Steering Committee which consisted of the following individuals:

- Government of Canada:

  Mr. Peter Maundrell - Development Manager, Tourism Canada, Department of Industry Trade and Commerce.

- Province of British Columbia:

  Mr. Ken Smith - Committee Director, TIDSA Manager, Ministry of Industry and Small Business Development;

Mr. Luciano Luchin - Regional Director, Ministry of Municipal Affairs;

Mr. Jim Lee, Recreation Planner - Ministry of Lands, Parks and Housing, Parks and Recreation Branch.

- Regional District of Alberni-Clayoquot (Local Government):

Mr. Al Kilpatrick - Administrator, Regional District of Alberni-Clayoquot;

Mr. Jim McManus - Senior Planner, Regional District of Alberni-Clayoquot;

Mr. Ken Hutchenson - Commissioner, Economic Development Commission.

- Municipalities of the Regional District of Alberni Clayoquot:

Jim Sawyer - City Administrator, City of Port Alberni

Penny Barr - Chairman, Regional District of Alberni-Clayoquot;
- Mayor, District Municipality of Tofino;

Murray Henderson - Clerk-Administrator, Village of Ucluelet.

Jacky Hansen - Clerk-Administrator, District/Municipality of Tofino;

Bill Blakely - Planning Consultant to the City of Port Alberni;
- President, Bill Blakely and Associates.

- The Consultant Study Team of MACLAREN PLANSEARCH-LAVALIN included:

Mr. James MacGregor - Project Manager, Tourism Consultant
Mr. Don Barcham - Project Director, Land Use Planning
Ms. Julie Paul - Marine and Fisheries Biologist
Mr. Bruce Haggerstone - Park Planner
Mr. Les Jones - Cartographer

- Frank Wolman and Associates:

  Mr. Frank Wolman - Market Analyst/ Economist; and
  Ms. Dorthy Doyle - Market Analyst;
  and;

- Mr. Turgut Var - Tourism Economist, Economic Impact Analyst

Finally we wish to thank those who showed us such generous hospitality as we travelled throughout the Region of Alberni-Clayoquot.

SUMMARY

1.0 INTRODUCTION

The Alberni-Clayoquot Tourism Development Strategy was commissioned in 1983 by the Travel Industry Subsidiary Agreement (TIDSA), the Regional District of Alberni-Clayoquot and the City of Port Alberni. The purpose of the study was to develop a strategy that would respond to the regions recent growth as a tourism destination, contribute to a more balanced industrial base, generate jobs and revenue and propose development opportunities for the private sector as well as government.

2.0 THEMES AND CONCEPTS

The region will be developed based on a "Pacific Rim" theme. Tourism programs and facilities will express both the marine character of the region's coastline, as well as the outdoor recreation opportunities of the inland areas.

The concept proposed three Primary Development Areas - Port Alberni, Ucluelet and Tofino and one Secondary Development Area - Bamfield.

3.0 REPORT FORMAT

The study has been presented in two documents. The Background Technical Report and the Overall Master Development Strategy.

The second volume outlines both the long range development opportunities as well as the implementation strategy.

The former provided an inventory, analysis and synthesis of all tourism related facilities and programs. It also compiled a list of potential development opportunities, and advanced alternative themes and development concepts.

The latter document is an action plan that identifies key development opportunities in terms of priority, implementation steps and responsibilities.

It has been layed out to allow each municipality to extract information pertinent to their area yet the report has a decidedly regional orientation encouraging decision makers to "think regionally and not locally".

4.0 OBJECTIVES

Main objectives include:

- To improve the economic climate of the region by outlining capital expenditure on attractions and services;
- To suggest low capital cost attractions and programmes for the private sector and communities to have an immediate affect on the industry;
- To respond to the potential economic spinoffs and employment opportunities resulting from Expo 86; and
- To add an all weather attraction in each destination area.

5.0 DEVELOPMENT STRATEGY AIMS

The proposed master development strategy is based on five aims:

- To increase length of stay;
- To increase overall expenditure;
- To increase overall volume by market penetration;
- To increase overall volume by market expansion; and
- To develop opportunities that respond to the weather conditions.

6.0 DEVELOPMENT ZONES

Development will be focused on three Primary Destination Areas and on the Secondary Destination Area.

- Port Alberni Primary Destination Area
- Ucluelet Primary Destination Area
- Tofino Primary Destination Area
- Bamfield Secondary Destination Area

These destination areas will be linked by a Primary Land Corridor - (Route 4) and a Primary Water Corridor (Alberni Inlet).

7.0 DEVELOPMENT PROGRAMS

Tourism programs will be developed to compliment the existing natural attraction base, provide all-weather appeal, have broader market appeal, etc.

Programs will be used to:

- interpret the natural, cultural and historic resources;
- provide animation to man-made attractions, services, etc.;
- attract a variety of tour packages to be established by Receptive Tour Operator; and
- develop special events, festivals and staged attractions, particularly those that could have provincial recognization.

Some of the more important programs that could be established include:

- Natural Cultural Resources

- offering a variety of community based package tours centered in the municipalities but extending throughout the region.
- providing ongoing programs at such attractions as Harbour Quay, Fishermans Wharf, MacMillan Island, Lady Rose, etc.
- increasing programs in conjunction with restaurants, lodging
- developing entertainment and cultural activities at Tin-Wis.

- **Festivals**

- launching a major festival or special event of provincial importance.

- **Information/Coordination**

- establishing a Pacific Rim Tourism Association.
- establishing a Regional Tourism Information Centre and secondary information displays.
- developing pilot signage programs for Port Alberni and Region.

- **Marketing**

- compiling yearly marketing data at both the Regional level as well as the individual operator.

- **Human Resources Development**

- training in marketing, product development, property management, hospitality.

8.0 DEVELOPMENT OPPORTUNITIES

Approximately 50 development opportunities have been identified. Those proposed as Priority I or II are listed by Destination Area and include order of magnitude costs.

8.1 PORT ALBERNI DESTINATION AREA

Priority I

- Harbour Quay	$ 980,000
- Municipal Campground (Phase 1)	315,000
- Signage Program	20,000
- Mill Tours	15,000
- Salmon Festival	10,000
- Regional Transportation (Phase 1)	120,000
- Marina Expansion	N/A

Priority II

- Lady Rose II	$ 250,000
- Downtown Streetscaping	100,000
- Della Falls	100,000
- Regional Transportation System (Phase II)	175,000
- Municipal Campground (Phase II)	215,000
- Ark Resort Upgrading	265,000

8.2 UCLUELET DESTINATION AREA

Priority I

- Community Suppers and Events	$ 2,000
- Recreation Vehicle Resort Campground	375,000
- MacMillan Island Fisheries Exhibit	650,000
- Canadian Princess Resort	1.25 million

Priority II

- Davison Plaza Upgrading	150,000
- Streetscaping	250,000

8.3 TOFINO DESTINATION AREA

Priority I

- Provincial Craft Festival	$ 10,000
- Community Suppers	N/A
- Destination Resort I	2.8 million
- Tin-Wis Cultural Resort	1.5 million
- Native Cultural Museum	1.5 million

Priority II

- Meares Island Exhibit Tours	$ 60,000
- Destination Resort II	2.5 million
- Motel Upgrading	110,000

8.4 BAMFIELD DESTINATION AREA

Priority I

- Visitor Services (toilets, water)	$ 10,000
- Campground (phase I)	500,000

Priority II

- Boardwalk Development	650,000
- Boat Cruise and Fishing Charters	75,000
- Area Trails Improvement	125,000
- Sports Fishing Accomodation	758,000
- Marina	115,000

8.5 REGIONAL DEVELOPMENT

Priority I

- Sub-Regional Tourism Association	$ 65,000
- Regional Brochure/Expo 86 blitz	70,000
- Regional Information Center - Phase I	50,000
- Regional Market Research	60,000
- Regional Signage	90,000
- Reception Package Tour Operation	9,000

Priority II

- Bed and Breakfast	2,000
- Regional Theatre	10,000
- Tofino Airport	75,000

8.6 PACIFIC RIM NATIONAL PARK

Priority II

- Campground expansion - Phase I 1.2 million

9.0 SOCIO ECONOMIC IMPACT

9.1 ECONOMIC IMPACT

Three multipliers have been developed for the Alberni-Clayoquot Region.

- sales multiplier (transactions)
- impact of revenue to residents multiplier
- employment multiplier

They suggest that present transactions in the region are $7,325,000 and create a total of 423 jobs (direct, indirect and induced). This presently results in government revenue totalling $1,194,342.00.

Future impact of tourism would result from the impact of construction as well as tourist spending.

The strategy suggests that $25,000,000 be spent on attractions, accomodations, special events, marketing, information and tourism organization. This will create approximately 3,000 jobs and generate 754 direct, indirect and induced jobs. Total income and sales from tourism could rise from a present $7.3 million/year to $12.9 million/year. This boost in revenue will be based on a projected 3.2% per annum growth in overnight visitors and 6.7% increase in people coming to the Region for the day.

9.2 SOCIAL IMPACTS

There is a healthy and positive attitude toward tourism in the region. It is seen as a generator of new jobs and income for local residents and a legitimate industrial activity that responds to recent downturns in the forestry and fisheries sector.

10.0 IMPLEMENTATION STRATEGY

10.1 OPTIONS

Various implementation strategies were evaluated. In conclusion:

- development will be equally distributed amongst each of the Primary Destination Areas;
- expenditure will firstly focus on information and marketing followed by attraction, development and provision of services;
- human resource projects will be favoured over capital intensive projects.

10.2 MECHANISMS

The implementation of a tourism development study requires the commitment and organization of all those individuals who will benefit from tourism growth.

Citizens, politicians, civil servants, and of course, members of the industry, must start working together through:

- the formation of action-oriented implementation committees;
- the identification of resource people;
- the identification of both public and private funds; and
- preparation of feasibility studies and development schedules.

1. INTRODUCTION

1.1 THE TOURISM DEVELOPMENT STRATEGY

Tourism growth in Canada, during the past decade, has encouraged regions and municipalities to consider the potential development opportunities and economic impacts of tourism on their communities. New attitudes towards the travel industry have resulted from its relative strength during the economic recession as well as the obvious decline in some of the more traditional resource-based industries.

The Regional District of Alberni-Clayoquot, and the City of Port Alberni in conjunction with TIDSA recognized the need to expand the tourism industry not only to increasingly diversify the economy, but also to respond to the declining commercial fishing and forestry industries in the region. Tourism has therefore been perceived as a potential growth sector that can generate employment, tax revenue, and community pride. More importantly, the strategy could assist the region in transferring from a primary-based economy to one that places greater emphasis on the growing service or tertiary sector.

With Pacific Rim National Park already serving as an international attraction and local political leaders, civil servants and businesses, and the region showing increased enthusiasm for tourism development, "the time seems to be right" to establish the long range objectives for tourism as well as the mechanisms to achieve them.

The Alberni-Clayoquot Regional Tourism Development Strategy outlines a course of action for tourism development over the next 10 years. The strategy nas resulted from matching the resource base with the existing and potential markets to provide a priorized and phased process of realizing the regions' tourism development potential.

The strategy reflects the development opportunities of the region, is set in the context of given trends and shifts in the travel industry and is responsive to the concerns and aspirations of the local people.

Although it has a decidedly private sector approach it also outlines opportunities for government involvement. Government participation is especially crucial because of the few established man-made attractions. As such, the strategy emphasizes close collaboration between both the public and private sectors.

1.2 THE APPROACH

The approach to preparing the regional strategy involved six steps as outlined in Figure 1. The following activities took place in each step:

Step 1 - the inventory of all existing and potential resources was done in concert with:

- the identification of existing and potential target markets and an assessment of community interest in tourism.

Step 2 - Existing resources and community carrying capacity were matched with the existing and potential target markets.

Step 3 - Based on the matching of resources with existing and potential markets, a number of potential development themes emerged.

Step 4 - the selected theme suggested three alternative overall regional development concepts. The final selected concept best reflected the chosen theme and consequently the potential theme development opportunities.

Step 5 - the master strategy was then developed to identify the individual development opportunities and guidelines, financial feasibility and man power requirements.

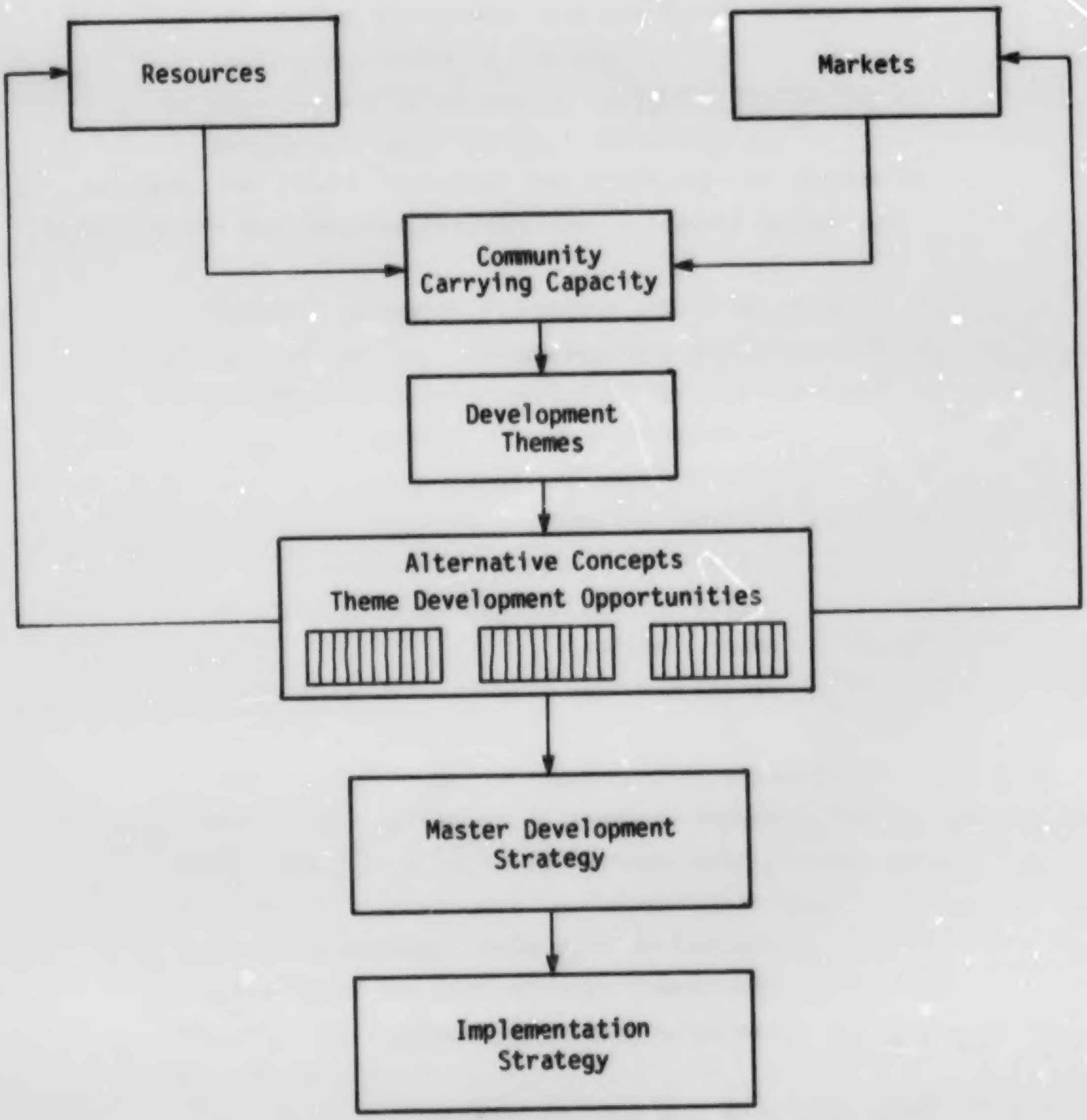
Resources
Markets
Community Carrying Capacity
Development Themes
Alternative Concepts
Theme Development Opportunities
Master Development Strategy
Implementation Strategy

Figure 1
Approach

Step 6 - the development opportunities were finally priorized in the implemention strategy. Costs, phasing, roles and responsibilities and marketing/promotion were also included. The social and economic impact was also considered.

1.3 THE BACKGROUND REPORT

An exhaustive background and technical report was prepared. It contained an inventory, analysis and synthesis of the following:

- natural, cultural, historical resources
- infrastructure and land use
- tourism resources including:
    - accommodation
    - food/beverage services
    - information services
    - attractions
    - recreation facilities
    - events/festivals
    - retail services

- market analysis including:
    - market segments
    - growth opportunities
    - tourism trends
    - competition from other regions
    - development opportunities and constraints
    - community issues and trends.

These data were then used to prepare:

- a regional theme
- a development concept
- a preliminary list of development opportunities

1.3.1 Development Opportunities

Development opportunities were presented in detail according to:

- resource base
- tourism/recreation activities
- relationship to an overall strategy
- development opportunities and constraints

Each development was then rated as to its impact on:

- seasonality
- markets (primary, secondary, tertiary)
- strategy
    - length of stay
    - weather
    - image/theme
    - visitation volume
    - shoulder season
- development sectors (private, public).

1.3.2 Regional Theme

In the final chapter of the Background Report, three regional themes based on Alberni Clayoquots' distinctiveness, exclusiveness, attractivenesss and preferable characteristics as a destination region were presented and then reviewed by the Steering Committee.

"Pacific Rim Tourism Region" was selected as the preferred theme because it:

- responded to the selected images;
- is an established name within the region;
- is promoted nationally by Parks Canada;
- encompasses the opportunities of the entire region, including coastal and inland;

- is distinctive and attractive;
- is an international phrase used frequently by the media;
- relates not only to the typical coastal/beach experiences but also economic growth, new trading opportunities and their associated activities, international shipping, wood processing etc.; and
- is broad and flexible yet exclusive to the region.

Due to its flexibility it may also be used as the basis for various promotional campaigns that either reflect the entire region, areas, or specific development opportunities.

1.3.3 Development Concepts

Three concept proposals were advanced:

Proposal 1: The Port Alberni Area was considered the primary development area, Tofino and Ucluelet were secondary development areas and Bamfield was a tertiary development area.

Proposal 2: Ucluelet and Tofino was a primary development area, Port Alberni is a secondary development area and Bamfield as a tertiary development area.

Proposal 3: The areas of Port Alberni, Ucluelet and Tofino were selected as primary development areas with Bamfield as a secondary development area.

While proposal 1 and 2 reflect certain regional realities they were rejected because they do not support the overall diversity or range of development opportunities that can be found in Alberni-Clayoquot.

The evaluation process is presented in Figure 1-2.

	PROPOSAL		
Criteria	1	2	3
RESPONSE TO			
- primary markets	0	●	●
- secondary markets		●	●
- tertiary markets		0	●
- "Pacific Rim" theme		0	●
COMMUNITY			
- supports interaction		0	●
- reflects unique character of			
Port Alberni Area	●		●
Ucluelet Area		●	●
Tofino Area		●	●
Bamfield Area			0
REGIONAL BALANCE			
- economic impact		0	●
- environmental impact	●	0	0
- social impact	●	●	●
POLITICAL			
- strengthens RDA-C through Regional Cohesiveness			●
- supports intermunicipal collaboration		0	●
RESOURCES			
- natural - marine		●	●
- coastal	0	●	●
- inland	●		●
- man-made	●		●

No Impact
Moderate Impact 0
High Impact ●

FIGURE 1-2

Alternative Concept Evaluation

The final concept (proposal 3) was chosen because it is the one that most closely responded to both the suggested theme as well as the variety of potential development opportunities. It also:

- supports an entire spectrum of potential tourism activities expressed by the "Pacific Rim" theme;
- encourages balanced and integrated development throughout the region;
- allows for sharing of major development responsibilities amongst the municipalities of Port Alberni, Ucluelet and Tofino;
- encourages a dispersion of travellers throughout the region and consequently a more equitable distribution of economic benefits as well as minimizing social and lifestyle impacts;
- promotes the unique natural and cultural integrity of each community and allows development areas to develop their own opportunities within the context of the theme; and
- is politically acceptable and promotes interaction, interdependance and cohesion between the three major communities.

The selected concept means that there will therefore be three development areas of primary development:

- Port Alberni
- Ucluelet
- Tofino

Bamfield will be a secondary development area.

The importance of the selection of this concept is underlined by two factors:

1. The development, marketing promotion etc., is to be equitably distributed amongst the three primary development areas.

2. Each of the three development areas must, within themselves, establish competitive mix of attractions and services that correspond to their location and orientation. For instance if one of the three areas starts to develop quickly, at the expense of another area, the concept will cease to serve its goal of creating balanced, cohesive and integrated tourism development throughout the region.

   The following list indicates the major development opportunities that when completed will provide the region with three equally strong yet structurally different development areas.

1. Primary Development Area - PORT ALBERNI

Primary Attractions	- Harbourfront* - Lady Rose II - Sproat Lake Water Theme Park - Special Events and Theatre - Salmon Fishing Activities - Della Falls
Primary Accommodation	- 500+ existing units* (50% of accommodation in region)
Primary Food Services	- Wide variety of restaurants*
Primary Retail	- Most available retail outlets*
Primary Staging Area	- Alberni Inlet to Barkley Sound* and Coast - Route 4 to Coast*

2. Primary Development Area - UCLUELET

Primary Attractions	- MacMillan Island Exhibit - Canadian Princess Destination Resort* - Pacific Rim National Park*
Primary Accommodation/ Resort Area	- 250+ units including expansion (50% of coastal accommodation)* - Recreation Vehicle Resort Campground
Primary Food Services	- 8 restaurants- including expansion (50% of coastal restaurants)*
Primary Retail	- Davison Plaza* - Most shops on coast
Primary Staging	- Cruise boats and charters to Barkley Sound/Broken Group*

3. Primary Development Area - TOFINO

Primary Attractions	- Fishermans Village - Underwater Marine Exhibit - Pacific Rim National Park - Native Cultural Centre/Museum - Meares Island Tour

*Existing

Primary Accommodation/ Resort Area	- Destination Resorts:* 250+ units including expansion (50% of coastal accommodation) - 575 campsites* - 60 seasonal accommodation units.
Primary Food Services	- 8 restaurants-including expansion (50% of coastal restaurants)
Primary Retail	- Fishermans Village
Primary Staging Area	- Clayoquot Sound* - Meares Island - Hot Springs Cove*

4. Secondary Development Area - BAMFIELD

Secondary Attractions	- Boardwalk - Alternative Energy Display - Marine Biology Station* - Trails*
Secondary Accommodation	- 100 unit campground - 35+ roofed units - Seasonal accommodation
Secondary Food Services	- 1 restaurant*
Secondary Staging Area	- West Coast Trail* - Barkley Sound*

*Existing

1.4 THE OVERALL MASTER DEVELOPMENT STRATEGY

This second text, like the previous Background Report, is laid out in a logical sequence based on the principles of the tourism planning process. Starting from the regional perspective it leads up to the specific development opportunities in each destination area.

Nevertheless by removing specific sections, smaller versions of the strategy can also be extracted for each individual Destination Area or municipality.

The organization of the report is as follows:

(a) Master Development Strategy

The text begins with a series of goals and objectives for regional tourism development.

This is followed by a development strategy that firstly establishes the aims of the strategy which are subsequently supported by various overall development principles, i.e. environmental protection, etc.

The strategy then becomes more site specific with the presentation of development zones including an outline of the various Destination Areas, the linkages between them, and the area subthemes.

The strategy then becomes even more detailed and outlines individual regionally-based tourism programs as they relate to the natural, historical and cultural resources as well as all attraction and service components (package tours, signage, promotion, manpower training, etc.). The development strategy concludes with a comprehensive description of each proposed development opportunity. They are grouped according to Destination Area for easy access by each community.

(b) Implementation Strategy

The Master Development strategy is then followed by the Implementation Strategy which firstly outlines and evaluates optional implementation priorities.

This enables the report to present the various priority levels for the various opportunities in each Destination Area.

Once priorities have been established, development costs, an implementation schedule, implementation mechanisms, roles and responsibilities, and a promotion plan are presented.

While the strategy can be defined as community-based and each municipality can extract specific information under the Destination Area headings, it is first and foremost a Regional Strategy. There has been a conscious approach in presenting the strategy in such a way as to encourage its readers to "think regionally and act locally".

2. GOALS AND OBJECTIVES

The goals and objectives have been outlined in general terms in the Background/Technical Report. The Master Strategy will redefine them in more explicit terms.

2.1 GOALS

The ultimate goals of tourism development in the region are to:

- create a healthy and successful tourism industry within the region;
- allow each major community, within the region, access to the economic and employment benefits of tourism development;
- provide additional opportunities for private sector investment in the region; and
- use tourism as an instrument for skill development, the protection of cultural heritage and the preservation of environmental resources.

2.2 OBJECTIVES

The goals will be achieved through the realization of the following specific objectives.

2.2.1 Economic Objectives

- Improve the economic climate of the region by encouraging capital expenditure on attractions and services over the next 10 years, thus creating new construction jobs and generating increased income, transactions and sales revenue.

- promote low capital cost attractions such as packaged tours, festivals and special events to enable the private sector and community organizations to more readily enter the industry.

- create approximately 100 new full time jobs (over the next 10 years) by the operation of tourism facilities and to generate most of those positions (66 or two-thirds) in the first few years of the strategy implementation;

- significantly increase visitor volume by 3-4%/year on overnight visitors, and 6-7%/year on day-trippers;

- respond to the potential economic spin-offs and employment opportunities created by Expo 86;

- extend the length of the tourist season by the addition of:
  - . all weather attractions
  - . year-round resorts

- increase opportunity for tourist spending by the addition of new attractions including one in each Destination Area;

- attracting new markets by improving the national and international reputation of the region by adding four attractions unique to North America, including:
  - . Della Falls Improvements
  - . Native Cultural Resort/Museum
  - . Underwater Marine Museum; and
  - . Sea Safety Museum and Exhibits

- provide opportunity for government financial assistance to the region thus creating additional tax revenue.

2.2.2 Cultural

- Protect and enhance the cultural values of the native people by the development of a Native Cultural Centre/Museum;

- ensure an organized development that is in keeping with the aspirations of the people by forming a regional tourism association for Alberni-Clayoquot with representation from each community;

- develop a greater sense of local history and events by the development of such attractions as:
  - the Heritage Sawmill (Harbour Quay);
  - the Sea Safety Museum;
  - Native Cultural Resort;
  - Fort Defiance, etc.

- increase recreation opportunities for locals with projects such as Fisherman's Village, Harbour Quay, Native Cultural Centre, etc.

2.2.3 Environmental

- protect, as much as possible, the natural environment by concentrating development in development areas, focussing on the communities;

- promote an awareness of the environment with such projects as the proposed MacMillan Island Fisheries Exhibit, and the Alternative Energy Display.

2.2.4 Community

- private opportunity for citizens to become involved in non-capital attractions such as festivals, staged attractions such as festivals, staged attractions and special events.

- minimize the impact of tourism on each community through proper planning and maintaining a scale of development that respects the character of the community.

3. DEVELOPMENT STRATEGY

A regional tourism strategy is a plan of action based on certain aims that proposes the activities and developments to take place and when their implementation occurs.

The major issues affecting tourism development in Alberni Clayoquot were clearly expressed by the tourism operators, government officials, and key local residents. The value of a strategy will finally be assessed by its ability to identify aims that respond to those issues.

The five strategy aims which have been identified are:

- Increase length of stay and overall travel expenditures.
- Increase the overall volume of travel to the region.
- Develop opportunities that respond to weather conditions.
- Increase volume and length during the shoulder season.
- Respond to the proposed theme and concept.

Frequently several of these aims may work in concert to produce the desired effect. For instance a development that responds to weather conditions may also increase length of stay, or increase volume in the shoulder season.

• Length of Stay/Overall Expenditure

The length of stay in Port Alberni (3.7 nights) is slightly higher than the average for Vancouver Island (3.6). Ucluelet (3.1) and Tofino (3.1) are slightly lower. Many destination areas have lengths of stay that are longer however Alberni Clayoquot has few attractions other than Pacific Rim National Park, to hold the visitors for an extended period.

Studies have shown that if you can draw a traveller to an attraction for three to four hours, it greatly increases the chance of an overnight stay in the region.

Many of the proposed development opportunities encourage a greater length of stay. For instance the Fishermans Village, or Harbour Quay would provide at least two to four hours of activity. As well, proposed destination resorts may keep people in the region for as much as four to six days.

Also, man-made attractions, quality accommodation and special events provide more opportunity for the purchase of goods, services and entertainment thus increasing overall per capita expenditures.

- Volume of Travel

The region receives approximately 256,000 visitors per year or only 7.5% of the total visitors to Vancouver Island. While road access has been a barrier to higher volumes in the past, this is no longer the case. It is therefore possible to increase overall travel to the region by increased marketing and the development of those attractions and services that motivate people to visit. Again, attractions like Harbour Quay, the MacMillan Island Fisheries Exhibit, the Underwater Marine Interpretation Exhibit as well as established special events and specialty tours encourage both market expansion and market penetration.

- Weather Conditions

Inclement weather frequently affects the travellers' movements. Continuous rain, for instance will virtually empty a campground in the region if it lasts for more than two days. Attractions should therefore be designed to both protect the visitor as well as provide an alternative to the exposed natural-based attractions. Covered shopping areas (e.g. Harbour Quay, Fishermans Village), specific attractions (MacMillan Island Exhibit, Native Cultural center) and activities (education courses, video presentations, etc.) have been proposed to respond to the weather conditions and consequently improve consumer satisfaction and increase length of stay.

- Theme

The theme is a result of matching available resources with existing and proposed markets. Theme opportunities therefore promote the values of the region and respond to the market demands. The development proposals individually and collectively respond to the "Pacific Rim" theme. Seaside locations combined with water access opportunities enhance the coastal experience. The Bamfield Boardwalk, beach resorts and a variety of boat cruises offer the visitor a chance to encounter the Pacific West Coast. Collectively they suggest numerous package tours for those group travellers attracted to various images created by the Pacific Rim theme.

- Shoulder Season

Seasonality is a major issue for most of the existing tourist facilities in the region. The strategy must therefore attempt to create more response from visitors during the shoulder months, particularly April, May and October, November. Efforts to increase cash flow in motels and restaurants, during these months would be well received by operators. The improved cash position would consequently enable more capital investment in facilities and provide better service to the summer volumes.

The emphasis on all weather man-made attractions, as compared to natural attractions, resorts with indoor amenities and educational courses encourage additional visits in the shoulder months.

3.1 DEVELOPMENT PRINCIPLES

3.1.1 Environmental Protection

Tourists are drawn to Alberni-Clayoquot because of the natural attractions. Regardless of future man-made attractions and events, it will always be the beaches, the islands, the inlets, the mountains and lakes, etc., that will continue to be the main reason for visiting the region. These features must, therefore, be protected and where environmental degradation has occurred, the situation should be enhanced.

While motherhood statements are frequently forwarded when discussing environmental protection and tourism, they have not been enough to prevent the degradation of key international tourism destinations like Acapulco Bay, Niagara Falls and, to a lesser degree, Lake Okanagan.

Tourists pollute and they recurrently, albeit unintentionally, destroy the resource that has brought them to a region. Alberni-Clayoquot is an emerging tourist destination area and consequently has the opportunity to identify specific areas of potential environmental destruction and commence the appropriate measures to prevent the destruction or loss of a natural resource.

Areas requiring specific environmental protection include:

3.1.1.1 Bamfield

- Environmental Issue

The "invasion" of tourists, specifically sports fishermen, into Bamfield, has had a significant impact on the aesthetics of this tiny, typical coastal fishing village. Not only has it disrupted the quality of life for local residents, it seems to be having a negative impact on those visitors who have come solely to experience Bamfield's quaint character.

- Mitigative Measures

An alternative camping situation would do much to alleviate the roadway congestion, visual blight, litter and frequent agressive host/guest interaction.

A new campground will not necessarily turn around a tradition of "no charge-on-street parking" and therefore law enforcement will be required for the first few years. Bamfield is not however in a position to enforce street parking. If the R.C.M.P. are financially incapable of responding to the issue, a more unorthodox solution will have to be sought, such as the use of the Coast Guard or the appointment of a local officer through the RDA-C to enforce a parking regulation.

3.1.1.2 West Coast Trail

- Environmental Issue

Complaints of overuse and the resulting visual degradation have been raised concerning the use of this unique North American hiking trail. The trail presently attracts approximately 6000 visitors and a peak saturation points seems imminent.

- Mitigative Measures

Fortunately, Parks Canada is aware of the situation and although a solution may be politically unattractive it would appear that visitation numbers will have to be limited during the summer season. The ensuing complaints, resulting from this crowd control, could be offset by encouraging off-season use (for the mutual benefit of local tourism services) and directing others to the Della Falls trail system.

3.1.1.3 The Broken Group

- Environmental Issues

This island grouping is also reaching a saturation point, a condition where the number of visitors visually and physically (congested campsites) destroys the quality of the "primitive" canoeing, boating and kayaking experience that has made these protected waters so popular. Again, Parks Canada is aware of the situation, however because of unlimited points of entry, such potential solutions as controlling access, seem out of the question.

- Mitigative Measures

In collaboration with Provincial Parks, private enterprise could be investigating the provision of camping or accommodation services outside the Park boundary at Howard Point, Lyall Point or even in the Pinkerton Island Group. These embarkation points could be served by the Lady Rose and their peripheral location would encourage boating amongst other island groupings.

3.1.1.4 Meares Island

- Environmental Issues

The resource conflict issues have been reviewed in a number of documents and discussed in the Background Report. A decision has also been made to proceed initially with the logging of the north section of the island. This action will not keep visitors away from Tofino or the Alberni-Clayoquot region however, if the final logged area is visually evident from the Town of Tofino it will unquestionably have a negative impact on the quality of the travellers' experience to this resort municipality. In fact, it is the opinion of the consultant, it will be even more detrimental than the impact that the clear cutting of Mt. Ozard has had on Ucluelet because of the proximity to Tofino to the mountain face.

Logging of Meares Island will also affect proposed boat tours of Clayoquot Sound or of nature or historic (Fort Defiance) interpretation programs on Meares Island.

- Mitigative Measures

Protection of Meares Island is important to the quality of the tourism experience in Tofino and it is fundamentally the responsibility of Tofino council and residents to continue to seek a solution that is more responsive to the Village's role as both a primary tourism development area and a primary staging area to Clayoquot Sound and Meares Island. Since it will be a number of years before logging of the most visually sensitive areas commences, on going dialogue between RDA-C, for a regional tourism association, local municipalities, etc.) with the Ministry of Forests should continue with the hopes of reaching a solution that is more acceptable to the regional tourism industry.

3.1.1.5 Forestry and Commercial Fishing

- Environmental Issues

Both forestry and commercial fishing potentially have an impact on tourism resources.

Fishing - Investigation into future fishing stocks suggest that, unlike the Georgia Straits, the fishing stocks will remain strong on the west coast of Vancouver Island and sports fishing will, over the next decade, be controlled more by available facilities than a reduced fish population. However, this situation would be drastically altered if a total ban or quota system is placed on fishing the Georgia Straits - a move that seems possible in the next five to ten years.

- Mitigative Measures

A federal restrictions on sports fishing in Georgia straits would initially have a positive impact on sports fishing and tourism in Alberni-Clayoquot and especially Port Alberni. However, due to the additional fishing pressure, these fish stocks would have to be closely monitored and output from the Robertson Creek and Nitnat Lake Hatcheries increased.

Forestry - Forestry has been instrumental in opening up many roads for tourist access and recreation travel, throughout the region and the forest industry itself has interesting interpretation possibilities. Yet, the clear-cut slopes of mountains and river valleys of the region, particularly in this tourism destination region, do not constitute an attraction and, in fact, contribute to the overall visitor dissatisfaction[1].

The American and European tourists find some Canadian forestry practices particularly antiquated since many have been exposed, over the past decade, to logging techniques that favour higher levels of visual and environmental protection.

The five year plan for logging indicates that there will be little cutting in those sensitive areas in proximity to travel corridors and primary development areas with emphasis on the Sproat Lake Division . Beyond that time frame, however, timber extraction impacts are impossible to predict.

- Mitigative Measures

A representative of the forestry industry should be selected to work with the travel industry or regional tourism association to continually inform them of logging plans and relate concerns to the Ministry of Forests and logging companies.

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[1] Many viewer preference studies attest to this fact, particularly those carried out by the Pacific Northwest Forest Service, U.S.D.A.

Figure 3-1 following outlines the environmental issues and mitigative measures.

3.1.2 Inter-Industry Co-operation

- Issues

The major issues and conflicts that typically arise between resource extraction industries, such as forestry and fishing, have been outlined in the previous section (3.1.1.5). To those environmental issues can be added such conflicts as:

. competition for labour (especially in summer);
. competition for government funding and political support;
. confrontation between traditional primary sector attitudes/values and contemporary service sector requirements.

The conflicts are typical in a region that is in the process of transformation from a primary industry base to a growing tertiary sector focus. The point is, however, that due to both automation and increased competition from Third World nations, the primary sector is shrinking and regions such as Alberni Clayoquot must look to the service sector for new employment creation. The Tourism industry is labour intensive and provides many job-entry possibilities for movement from the primary to tertiary sectors.

- Action

A proposed Sub-Regional Tourism Association would maintain constant liaison with representatives of the main industries operating in the region. As well, they would provide a strong voice in support of tourism issues when conflicts arise.

The future strength of Alberni-Clayoquot's economic base lies not in the competition/confrontation between tourism and forestry/fishing but in an inter-industry collaboration that benefits all citizens of the region.

ISSUES	MITIGATIVE MEASURES	RESPONSIBILITY
1. Bamfield-on-street parking/camping-impact on community lifestyle	- construction of a campground - identification of law enforcement measures	R.D.A.-C R.C.M.P. Coast Guard
2. West Coast Trail - Excessive summer use	- peak crowd-control - promotion of other trails i.e. Della Falls	Parks Canada R.D.A.-C Proposed Tourism Association
3. Broken Group Islands High visitation and impact on user experience	- provide peripheral accommodation to encourage user dispersion and mainland based facilities	Parks Canada Provincial Parks
4. Meares Island Partial logging of an important visual and environmental feature for Tofino and Clayoquot Sound	- constant negotiations to assure maximum protection of the islands resources	District Municipality of Tofino Proposed Sub Regional Tourism Association R.D.A.-C Friends of Clayoquot Sound Ministry of Forests Proposed Tourism Association
5a. Fishing Protection of existing levels of west coast fish stock from added pressures	- constant monitoring of fish stocks and any change in fishing pressure	Ministry of Enviroment Department of Fisheries and Oceans
5b. Forestry Visual impact on primary tourism areas	- Review of Forestry 5 year plan	Proposed Sub-Regional Tourism Association Ministry of Forests R.D.A.-C

Figure 3-1

Environmental Issues and Mitigative Measures

3.1.3 Public Involvement in Tourism Development

ALthough much of the public is aware of tourism as a growing economic force in Alberni-Clayoquot, there has not yet been an overall citizen expression of either moderate or intense interest. Tourism is relatively recent and the industry has only started to be a source of small business (approximately 100) and a generator of employment and tax revenue. Each of the four communities has expressed a decidedly different concern for tourism.

Bamfield has been exposed to many of the negative facets of tourism (overcrowding of streets, confrontation) as well as one of the more difficult tourism market segments (fishermen in campers). Their present hositility to tourists who disrupt the quality of life is understandable.

In Ucluelet, interest is mostly demonstrated by the 25 or more tourism operators and the public still focuses on the logging and fishing for employment opportunities. This latter attitude is expressed by local government. However, the Chamber of Commerce is one group that has recently shown to be enthusiastic about tourism.

Tofino council and many citizens have an interest in tourism but not at the risk of the loss of a lifestyle that has attracted many people to live in this town. The Meares Island issue clearly expressed the local concern for protection of natural (and tourism) resources. Tourism growth will be supported but only at a pace and in a context that maintains the quality of life.

Port Alberni has shown an unprecendented level of interest in tourism. The efforts behind Harbour Quay, the Tourism Information Centre and concern for an expanded municipal campground suggest a political and private sector support for diversifying the economy and embracing tourism as a viable alternative to creating employment following the boom years of the forestry industry.

Public interest in tourism will only be maintained by constant citizen involvement in the planning of specific result-oriented tourism projects during the implementation of this master plan.

Examples of how the public may become more aware of tourism include:

- Bamfield

- Involvement in the planning and phasing of the proposed campground;
- Community meetings to solve the on-street parking problem.

- Ucluelet

Public involvement could include:

- Organizing public support for the construction of the MacMillan Island Fisheries Exhibit;
- Developing recognition of the need for an improvement to the town's streetscape and waterfront;
- promotion of the benefits (municipal, regional) of tourism by the Chamber of Commerce and private operators;
- public workshops on future plans for the Canadian Princess, MacMillan Island, streetscape beautification, etc., will increase local appreciation of tourism.

- Tofino

The public has already had exposure to tourism as an industry during municipal restructuring and the long range planning of Meares Island.

This momentum and enthusiasm should be maintained by the constant growth of tourism in the town. The Fishermans Village, Destination Resort development and the organization of a major craft festival in the next few years will provide ample opportunity for continual dialogue, reflection and self-analysis on the community's involvement in tourism. As in all communities public consultation should be stimulated by the Chamber of Commerce, and the municipal council and supported by Sub-Regional Tourism Association.

- Port Alberni

The commitment of Port Alberni's city council, city administration and Chamber of Commerce is an excellent example of a municipality addressing tourism growth with action-oriented projects. Harbour Quay has been the key stimulus and has received the support of citizens and the more than 70 tourist operators in the Port Alberni area. Public involvement should be maintained in the on-going Harbour Quay developments, the municipal campground, construction and the promotion of salmon fishing through:

- public meetings;
- media exposure; and
- discussions with the private operators.

3.1.4 Recreation Opportunities for Locals

One of the benefits of increased tourism activity in the region should be additional recreational opportunities for local citizens. Many of the more recent tourism facilities have, to varying degrees, become local recreation facilities. For instance, the swimming pool at the West Coast Motel, restaurants in Tofino and marinas in Port Alberni are constantly used by citizens.

The tourism strategy will continue to emphasize this approach with such developments as:

- The Fishermans Village, which like Harbour Quay, will be a gathering, entertainment and socializing focus for locals as well as an entrance facility to the community;
- The Bamfield Boardwalk and ancillary services (cafe-restaurant) will be popular with residents;
- The Davison Plaza, presently a retail focus for Ucluelet, could become even more popular with residents if an upgrading allowed for a gathering area in a more pleasant surrounding.

Sproat Lake Water Theme Park will undoubtedly be popular with property owners and campers around the lake, however it will rely firstly on local support from the Port Alberni Area and from Parksville/Qualicum summer visitors to generate revenue.

New community events, a Native Cultural Centre, regional theatre, and educational courses in craft and culture would be available to locals as well as provide additional funds to community facilities for the rental of schools, community halls, churches and parks.

The strategy also protects certain areas, frequented by locals, from intense tourism developments. This has not been done to exclude tourists but rather to keep their impact at a level that will not adversely affect traditional recreation use of the various sites. Such areas include:

- Bamfield - Bradys Beach, Pachena Bay, Keeha Bay
- Tofino - Kennedy Lake, Hot Springs Cove
- Port Alberni - Poett Nook, Stirling Arm
- Toquart Bay

3.1.5 Inter-Community Collaboration

The tourism industry is different from other sectors. The product cannot be offered by any one member of the industry because the customers must be shared. Therefore the quality of the tourists experience is closely associated with the degree of communication that exist between the various components that make up the attractions and services. It must be remembered that:

- the performance of one operator affects the success of the others; and
- the attitudes in one municipality affects the tourists perception of others.

The tourist is not concerned about the differences that exist between the communities of a region, only the quality of the final overall travel experience/product. Both municipalities and operators must realize that the competition is not within the region but outside of it. Ucluelet is not competing with Tofino or Port Alberni but rather with Parksville-Qualicum, Campbell River and even Victoria.

As tourism regions become more competitive and as package tours increase the need for cooperation between all operators, the pressure for cooperation grows. In fact in several regions (Cape Breton, N.S., Madawaska; N.B., Charlevoix County, Quebec), tourism development has become a major unifying force.

A Sub-Regional Tourism Assocation should assume a key role in promoting collaboration, however there will be some other key actors including:

- each municipality - Port Alberni, as the largest community should play a primary role;
- each Chamber of Commerce - again, Port Alberni has already shown the strongest initiative;
- The Regional District of Alberni-Clayoquot
- B.C. Ministry of Tourism and Tourism Canada.
- MISBD - Business Counselling

Much has already been done to establish new community ties. Tourism may be the vehicle to strengthen them.

3.1.6 Integration with other Tourism Plans/Strategies

There are three tourism plans that will influence tourism development in the region; the following description outlines how the Alberni-Clayoquot Regional Tourism Strategy is responsive to each.

1. The British Columbia Tourism Development Strategy

The Alberni-Clayoquot Strategy is responsive to the initiative established the provincial strategy at the "Planning Sub-Strategy", the "Development Sub-Strategy" and the "Tourism Region Development Concept Level".

- Planning Sub-Strategy Level

- Market Orientation - proposed opportunities respond to existing and potential markets and focus is placed on increasing, numbers and types (e.g. "high-end" or wealthy travellers) of tourists into the region.
- Resource Orientation - development will focus on the high quality resources such as, the beaches, the Alberni Inlet, the Broken Group Islands etc., with development nodes (service/staging) being established in each of the four communities. The ability of each resource to sustain development will determine the scale of the development opportunity.
- Economic Orientation - the location of most proposed opportunities are community based in order to stimulate or diversify the municipal economy.
- Conserver Orientation - because many proposals are located in communities they do not degrade existing natural resource quality. Also the local needs are considered more important (e.g. Bamfield) than the potential opportunity to develop. Certain areas have been deferred from significant development until further conditions warrant (e.g. Toquart Bay).

- Development Sub-Strategy Level

The Regional Strategy is compatable with the three provincial development strategies.

- Strategy I - It both maintains and develops new market segments through both the upgrading and expansion of existing facilities and enhances existing areas by adding more attractions and improving hospitality services (entertainment, transportation etc.).
- Strategy II - It preserves such remote areas as Della Falls, Nitnat Lake, and much of Kennedy Lake and Clayoquot Sound, for local residents. Growth will primarily occur in designated areas (i.e. the Primary Development Areas).
- Strategy III - It identifies and encourages a high level of quality development opportunities and destination areas (resort communities) on a nodal corridor concept that will attract international, U.S. and domestic markets to compliment existing provincial, regional markets with specific attention to tourism trends and the energy situation.

- Tourism Region Development Concept Level

It differs on occasion at this level. It is similar in that it suggests that the "primary" markets are U.S., domestic, provincial, regional and is supportive of the seasons to attract a domestic market, especially in the fall with continued seat-saver sales during this season. While it recognizes that the single largest market is single/family groups it differs in its recognization of a rapidly emerging package tour mode. It is in agreement on the primary purpose of trip and the transportation mode however, it would include boating and especially fishing, along with the proposed unstructured and active land-based outdoor recreation activities. It also supports a short term (0-10 years) implementation period.

2. The Vancouver Island Regional Tourism Study

The Regional Strategy follows many of the guidelines of this study including:

- The designation of a Pacific Rim Regional Tourism Destination Area - it includes however, Port Alberni, Alberni Inlet and Barkley Sound in the area.

- Interpretive and scenic (marine-oriented) resources as the dominant theme.

- Upgrading the appearance of Tofino and Ucluelet and providing a high standard of food, accommodation, entertainment for destination oriented visitors and recognizing the importance of bus package tours to the area.

- Promoting the development and marketing of local Native Indian handcraft.

- Promoting Tofino and Ucluelet as resort communities including development of their respective waterfronts, festivals and special events and tours to Barkley Sound and Clayoquot Sound.

- Establish Port Alberni as the gateway to the Broken Group Islands with expanded boat tours, fishing and dive charters, theme attractions and marine interpretation exhibits

This strategy differs from the Vancouver Island Study in that it does not support:

- Expanding the accommodation base in Port Alberni;
  Reason: existing and future over supply

- Constructing a four-season destination resort on Toquart Bay;
  Reason: lack of year round attractions/services

- Constructing a 200 unit campground at Ucluelet;
  Reason: campground emphasis at Pacific Rim National Park

- Constructing a campground on Kennedy Lake; and
  Reason: campground emphasis on Pacific Ocean and National Park

- Construction of a four-season lodge in the Cape Beale-Keeha Bay area.
  Reason: road access and limited year-round facilities

3. Port Alberni Harbour Quay - Feasibility and Design Study for a Tourist Attraction

The Regional Strategy is completely supportive of the goals, orientation and component mix of this project. It establishes a definite tourism orientation for the city and provides (upon completion) both Port Alberni and the Region with a major manmade tourism attraction.

It also means that Port Alberni is a Primary Tourism Development area within the Region.

The Regional Strategy differs with the proposed development schedule. It is believed that more attractions must be a part of Phase I, or more realistically, that some of those features proposed for Phase II be commenced immediately after the termination of Phase I. There is a risk of starting with a private sector oriented project, yet lacking in those components that would actually draw the tourists to the site.

3.1.7 Market Research

It has been difficult to acquire accurate statistical data for the Regional Tourism Strategy. It is therefore imperative that the region initiate collection and compilation of quality market information. It should be gathered on a yearly basis and collection will have to start in 1985 since 1986 will not be a typical year due to the anticipated high non-resident visitation created by Expo 86.

Market research will enable the regional travel industry to:
- assess the impact of implementing the tourism strategy;
- evaluate the performance of new marketing programs; and
- determine shifts in market segments created by new product developments - particularly in the attraction/service sectors.

Market research should be carried out at two levels:
- the individual supplier or operator; and
- the region (proposed Regional Tourism Association or RDA-C).

- Supplier/Operator Market Research

All suppliers will be encouraged to survey their existing markets for both their own benefit as well as the region. The Sub-Regional Tourism Association will meet individual operators and suggest ways they can determine: visitor demographics, geographics, motivation and reaction to the region.

These data will therefore allow each operator to develop his own marketing plan. The collective orientation of all the various suppliers will form the basis of the ongoing regional marketing strategy.

- Regional Market Research

The Sub-Regional Tourism Association will be responsible for carrying a comprehensive Auto Exit Survey in 1985, which will be updated by a yearly mini survey.

An auto exit survey is particularly useful to the region because of the limited access points. The survey format would be similar (for comparison purposes) to the Visitor '79 survey, however modifications, such as in the MACLAREN PLANSEARCH Summer Survey, would be made to accommodate the resident visitor to the region.

3.1.8 Land Use and Development Strategies

Land use and development policies and regulations throughout the region should be supportive of the tourism strategies, goals, and objectives adopted for the region. While most jurisdictions do provide, in general, for the accommodation of tourist-oriented developments, more could be done to actively encourage such development through specifically designed policy.

For example, community and settlement plans should address directly the jurisdiction's attitudes and policies towards the expansion of tourist facilities. These policies should be further reflected in zoning regulations designed to provide the high degree of flexibility which many comprehensive mixed-use developments require.

Where possible, under existing enabling legislation, regulations should be tailored to the needs of tourist developments without compromising or sacrificing other community and neighbourhood interests, and should be consistent with the pertinent themes and roles of the regional tourism strategy.

The most useful single tool for this purpose is the Development Permit system and its accompanying design control and development cost/change provisions. Development permits should be an available rationale throughout the region and should be mandatory for all waterfront areas to enhance the special conditions which prevail in that environment, in keeping with section 717 (1) and (3) of the Municipal Act. It is apparent, that all of Section 717 (1) could be interpreted to apply to tourist-oriented areas.

As theming is a major component of the tourism strategy, and as the themes should be reflected in the details of physical development of the region, some form of design control should also be implemented. Signing, landscaping, exterior finishes, siting and other related matters, could be controlled through the sensitive and sensible use of Development Permits. For example:

- facility signage;
- architectural motifs, building facades, and set-backs;
- screening of parking areas; and
- protection of environmentally sensitive areas.

In assigning a particular development application, to new or existing areas and facilities against the expressed goals and objectives of tourism, a number of factors might be contained in a single check-list.

Criteria which may be used to judge the merits of a tourism facility - include the projects:

- response to the overall development concept and to the theme proposed for the destination area;
- ability to integrate cohesively with other projects in the destination area;
- potential to promote growth in the shoulder-season as well as attract new markets and increase overall visitation;
- respect for the thematic architectural motif and site planning that optimizes views and sun exposure;
- ability to either strengthen an existing development node or facilitate the establishment for a new cluster; and
- availability of all-weather components within the facility.

Advisory committees set up to assist elected officials in this matter should include representation from the tourism industry who are both familiar with, and sympathetic to, the regional themes and strategies.

3.2 DEVELOPMENT ZONES

The Alberni-Clayoquot Regional Development Concept, proposed in the Background Report, reflects the nodal corridor concept of both the provincial strategy and Vancouver Island Regional Study (Development Strategy). As a contemporary approach to tourism planning, a corridor/nodal (i.e. destination areas) approach implies a development strategy that:

- encourages development of community-based tourism;
- provides access along major travel corridors thus providing opportunities for broad market appeal, package tours, and sightseeing;
- stimulates balanced tourism development throughout the region;
- increases the economic and employment opportunities for more citizens throughout the region;
- contributes to economic diversification across the region;
- enables maximum exposure to a cross-section of a region's tourism resource base; and
- concentrates tourists in certain areas and creates a stronger image in the market place, a synergistic component mix and minimizes environmental impact on other hinterland areas.

The Vancouver Island Regional Tourism Study has designated one corridor (Route 4) and one destination Area (Ucluelet Tofino Peninsula) within the Alberni-Clayoquot Region. The Alberni Clayoquot Regional Tourism Strategy respects the basic integrity of that concept yet goes on to:

- provide greater detail in terms of attraction, service and staging areas;
- support a primary development status for Port Alberni because of its, attraction and staging potential rather than just its service capabilities;

- suggest a theme association for each of the primary development areas; and
- reflect the landscape and seascape units, as outlined in the background report.

Development Zones and Development Opportunities are part of an overall hierarchy that includes:

a) Development Zones
   - destination areas
   - attractions
   - services
   - staging areas
   - corridors
   - land-based
   - water-based

b) Development Opportunities and Programs
   - attractions
   - services (food, accommodation)
   - special events/programs
   - transportation
   - etc.

The planning of development zones is based on four planning criteria:

- the land/seascape units;
- potential for the clustering (development areas);
- location of travel/access corridors; and
- proximity to primary natural attractions.

A brief review of each of these planning criteria would be useful before defining the final development zones.

3.2.1 Land/Seascape Units

Eight units were defined and the resources of each provide the backbone of the overall regional development concept and its component development zones (destination areas and corridors or linkages). Refer to Map 2 - Background Document.

- The Port Alberni Primary Destination Area includes three units:
    - Alberni Inlet Unit;
    - Great Central Lake/Stamp River Unit;
    - Mt. Arrowsmith; and
    - Sproat Lake in the Sproat Lake/Kennedy Lake Corridor Unit.
- The Ucluelet Primary Destination Area includes part of the Barkley Sound Unit and part of the Ucluelet/Tofino Coastline Unit.
- The Tofino Primary Destination Area includes part of the Clayoquot Sound Unit and part of the Ucluelet/Tofino Coastline Unit.
- The Bamfield Secondary Destination Area includes part of the Barkley Sound Unit and the West Coast Trail Unit.
- The primary land-based corridor includes the Sproat Lake/ Kennedy Lake Corridor Unit.
- The primary water-based corridor includes the Alberni Inlet Unit.

This approach provides a tourism development concept that maximizes the potential of both land and water based opportunities as well as development of urban and natural areas.

3.2.2 Clustering of Projects

Existing and proposed development opportunities occur for the most part in clusters and are mostly located in municipalities.

- Attractions

While the main natural attraction is Pacific Rim National Park, future man-made attractions will be located in each of the four communities.

- Services

Most future services, including destination resorts, will be located in communities, especially Ucluelet and Tofino.

- Special Events and Programs

Festivals, community suppers, education courses and specialty tours will either be provided or staged from the four communities.

3.2.3 Primary Access Corridors (Linkages)

There are only two road and one boat corridors in the region with sufficient volume to be considered as travel corridors. Route 4 will provide access to the 3 primary destination areas. The Bamfield road will provide access to the secondary destination area and Alberni Inlet will be a primary water based corridor to Barkley Sound, and the Destination areas of Bamfield, Ucluelet and Tofino.

3.2.4 Proximity to Natural Attractions

The primary destination areas of Ucluelet and Tofino are immediately adjacent to the primary natural attraction (land-based) of Pacific Rim National Park and to the (water-based) attractions of Barkley Sound and Clayoquot Sound respectively.

The Port Alberni primary destination area is adjacent to the primary corridors of Route 4 and Alberni Inlet and surrounded by several secondary attractions including Mt. Arrowsmith, Sproat Lake, Great Central Lake, etc.

3.2.5 Destination Areas

Four destination areas are proposed and each is defined by its existing and proposed attractions, services and staging area functions.

3.2.5.1 Port Alberni Primary Destination Area

The City of Port Alberni and its surrounding resources constitute an integrated destination area. A variety of natural and man-made attractions combine with a large accommodation and restaurant supply and existing and proposed transportation facilities that enables the City to serve as both a staging area to Barkley Sound and a gateway to the Ucluelet/Tofino Coastline.

- Attractions Area

Major attractions such as the Harbour Quay development, the Lady Rose and the Alberni Museum will combine with an eventual downtown revitalization, increased recognition of the City as a major international salmon fishing destination, a water theme park at Sproat Lake and a strengthened ski development at Mt. Arrowsmith to rate this area as a primary destination area.

- Service Area

Over half of the regional accommodation units and restaurant tables are located in Port Alberni. There is an existing oversupply. This service resource then can play an important role, over the next few years, in responding to peak demand and allowing Port Alberni to channel its financial resources into attraction development and promotion rather than services.

- Staging Area

As an entrance to the region, a gateway to the coast and staging area for the resources of Alberni Inlet and Barkley Sound, Port Alberni is a primary staging area. Virtually the entire traffic flow through the region passes through the City. The largest passenger vessel (Lady Rose) is stationed here and the City has the most comprehensive tourist information centre.

3.2.5.2 Ucluelet Primary Destination Area

Ucluelet and Tofino will be developed as two distinct destination areas rather than one. While the municipalities have a similar resource base (Pacific Rim National Park, Barkley and Clayoquot Sound, etc.), they will emerge with separate, yet complementary identities within the regional strategy.

Ucluelet will continue to be the largest tourist service area in the region providing a variety of accommodation types, food services and special events.

- Attraction Area

The proposed MacMillan Island Fisheries Exhibit will set the tone for attraction development in Ucluelet. It will be supported by other fishing related attractions such as tours of the fish processing plants, fishing and marine interpretation trips to Barkley Sound, tours of the Coast Guard Management Center, etc. Even the principal destination resort, at the Canadian Princess will be closely linked to the MacMillan Island Exhibit creating a focus of nautical boutiques and accommodation. The proposed streetscape developments would take on a decidedly west coast style through the use of local materials for street furniture, traditional store facades, etc.

- Service Area

The new Canadian Princess Destination Resort, a proposed recreation vehicle campground, combined with expansion and upgrading of the existing accommodation and restaurant sector will make Ucluelet a true tourist service area.

As well, community facilities such as the school can be used for a variety of special events, community suppers, salmon barbeques, etc.

- Staging Area

Ucluelet will continue to develop as a major staging area for Barkley Sound. The Canadian Princess fishing and nature interpretation tours and the MacMillan Island Fisheries Exhibit will be a focus for day trips to Barkley Sound. Six charter operations presently serve the Sound from Ucluelet and the Lady Rose could eventually, with the addition of a second boat, dock once a day in the summer.

3.2.5.3 Tofino Primary Destination Area

Like Ucluelet, Tofino services Pacific Rim National Park but also has its own potential destination resources such as beaches and access to Clayoquot Sound and Meares Island. The community lifestyle and physical context suggest a development theme different from Ucluelet, such as "Recreation Resort" as compared to industrial activity interpretation in Ucluelet and Port Alberni.

- Attraction Area

Tofino's major existing attraction has been, until recently, its physical setting and proximity to the National Park. This changed with the restructuring of the town limits, adding the beach/coastal resources of MacKenzie Beach, Chesterman Beach and Cox Bay. It now potentially has some of the most interesting destination development opportunities in the region.

- Service Area

Tofino's accommodation and restaurant services have kept pace with tourism growth and has been slightly smaller than Ucluelets'. The newly acquired beach resources within the municipal boundaries provides ample opportunity for high quality, four-season resorts and their supporting amenities.

- Staging Area

Tofino is a staging area for Pacific Rim National Park and Clayoquot Sound. Tour boats, fishing groups etc. find abundant opportunities in Clayoquot Sound, on Meares Island and Stubbs Island and at Hot Springs Cove. Future developments will promote greater use of these natural resources.

3.2.5.4 Bamfield Secondary Destination Area

Bamfield has neither the physical resource base, facilities nor community support to be a primary destination area. It does however have some unique features that warrant its development as a destination area within the region.

- Attraction Area

Bamfield's small fishing village atmosphere and location on Barkley Sound are its prime attractions. These features can be further enhanced by promoting access to Cape Beale, Bradys Beach, Keeha Bay, as well as development of the Boardwalk, an alternative energy display and providing increased interpretation at the Marine Station.

- Service Area

Services in Bamfield are limited and respond essentially to sports fishermen, hikers on the West Coast trail and excursionists. The motel and restaurant adequately cater to the existing clientele however the addition of a campground and a seasonal resort would confirm Bamfield's role as a secondary service area.

- Staging Area

Local diving and fishing charters, a boat ramp and enough on-street parking to satisfy the visiting fisherman with a recreation vehicle to date have defined Bamfield's role as a staging area for Barkley Sound, the Deer Group and the Graveyard of the Pacific. The addition of a complete marina and docking facilities, and scheduled boat cruises to the Broken Group Islands and Ucluelet would support Bamfield's role as a secondary staging area.

3.2.6 Corridors and Linkages

Travel corridors, in the Alberni-Clayoquot region, serve more as linkages between destination areas than the comprehensive attraction/services corridors sometimes found in other destination regions. In fact, there does not appear to be viable development opportunities along either the land or the water corridors. This is the consultants opinion and is based on the following points:

- construction and operation along the water linkages is prohibitively expensive, because of transportation costs.

- Route 4 provides no natural features that would compete with the coastal resources.

3.2.6.1 Primary Land-based Corridor - Route 4

This corridor links the three primary destination areas of Port Alberni, Ucluelet and Tofino. Strictly speaking, Sproat Lake is a part of that corridor however because of the lake's historic and social link to Port Alberni it is considered part of that destination area.

The corridor runs adjacent to both the Kennedy River and Kennedy Lake. The views are excellent, yet there are relatively few opportunities for upgrading the existing rest areas and viewpoints. The road corridor is narrow and the draw of the coast is significant thus negating rest-area expansion.

3.2.6.2 Primary Water-based Corridor - Alberni Inlet

Again there are no significant development opportunities however the visual experience is one of most significant attractions in the region.

Therefore additional cruises and charters out of Port Alberni are the only identified development opportunity.

There have been discussions of restoring the old fish processing installations at Kildonan as well as establishing resorts at Chupp Point, however, the development costs and the low market demand would not make such projects viable over the next decade. Emphasis will then be placed on viewing the corridor and strengthening the water-based link between Port Alberni and Bamfield and Ucluelet.

3.2.6.3 Secondary Land Based Corridor Bamfield Road

The road between Port Alberni and Bamfield offers no development opportunities other than at China Creek (within Port Alberni Destination Area) and Pachena Bay (within Bamfield Destination Area). Poett Nook which has traditionally been used by fisherman would continue to serve as a minor staging area to Barkley Sound.

3.2.6.4 Secondary Water-based Corridor-Barkley Sound

Water access between Bamfield and Ucluelet holds some development potential however the majority of visitors to either community arrive by car, and a road-water connection with the Bamfield/Port Alberni road corridor is not feasible. Ferry service would be prohibitively expensive given equipment cost, travel time, seasonality, volumes, etc. However the corridor is potentially part of a water circuit that includes Port Alberni, Ucluelet, the Broken Group Islands and Bamfield. Such a linkage would also promote bus/boat packages between Port Alberni, Ucluelet and Bamfield.

- Tertiary Land Base Corridors

Kennedy Lake, Great Central Lake, Toquart Bay, Poett Nook, Sarita, Stamp Falls and Mount Arrowsmith are connected to primary and secondary corridors by tertairy corridors. They are only linkages and offer no development opportunity yet upgrading of the Mount Arrowsmith and Toquart Bay linkages would improve access.

Forestry roads provide tertiary corridors to a variety of unstructured activities such as 4-wheel drive cruising, freshwater fishing and some hunting. The roads are maintained by the forestry companies and offer few development opportunties.

3.2.7 Destination Area Themes

Each destination area will be developed on a particular theme (regional sub-themes) which:

- supports the overall regional theme of "Pacific Rim";
- identifies a unique orientation to each destination area creating regional diversity and maximizing community resource opportunities; and
- establishes a long range development context for each destination area.

Each theme is proposed as a framework for development and is not meant to limit other non-thematic opportunities. However for each new development proposal it is hoped that the integrity of the destination area theme will be maintained.

Four themes are proposed; two (Port Alberni, Ucluelet) have a decidedly industrial or "work ethic" focus, and two (Tofino, Bamfield) have recreation resort or a "leisure ethic orientation". The concept of both work-centered and leisure-centered themes within the region is interesting and seems to reflect two of the major forces in society at this point - the changing work, and leisure ethics. Researchers dealing in future changes have long been predicting the end of the work ethic and growth of the leisure ethic. This has not proven true, in fact the past few years have witnessed a re-evaluation and new respect for the work ethic both confirming its values and establishing its importance to human development. What is emerging then is a "life ethic", which embraces both work and leisure.

The presence of both the industrial communities of Port Alberni and Ucluelet, and the recreation/retreat focused communities of Tofino and Bamfield, enable the region as a whole to promote both ethics and have broad market appeal.

3.2.6.1 Destination Areas

- Port Alberni Destination Area
  Theme: Forest Industry
  Area Sub-Theme: Outdoor Recreation

Port Alberni is known throughout the primary and secondary markets as a forest industry city. It has a proud heritage of contributing to the economic development of British Columbia, as a forestry centre, and to Canada as a shipping centre to foreign markets. This heritage is immediately reflected in the Harbour Quay Development with the proposed attractions being a heritage lumber mill and the Two Spot Locomotive. Harbour Quay is also proposed as a "working waterfront" enabling the attraction to provide observation of the present marine industrial environment.

The forestry theme is further supported by mill tours and hands-on industry exhibits at the Alberni Museum. This theme should not of course inhibit the interpretation and promotion of, for instance, the fishing resources, however the focus of attraction development, and particularly Harbour Quay, should maintain that impression of a coastal forestry/shipping port.

This work/industry theme within Port Alberni will be balanced by an "outdoor recreation" theme in the surrounding area. Camping and sport fishing at China Creek, a water park at Sproat Lake supported by continued campground expansion, hiking at Della Falls and skiing at Mount Arrowsmith encourage outdoor recreation activities.

- Ucluelet Destination Area
  Area Sub-Theme: Fishing Industry

Ucluelet has its roots in the fishing and forestry industry. From a municipal (and regional) tourism development point of view, it is the fishing industry that suggests the most attraction development potential. The MacMillan Island Fisheries Exhibit and its Sea Safety component, tours of fish plants and even the Canadian Princess Resort orientation as a salmon fishing charter service will promote that theme.

- Tofino Destination Area
  Theme: Recreation Resort/Culture
  Area Sub-Theme: Native Culture

Tofino has long been a draw for short and long term visits to the Ucluelet/Tofino Coastline. This will continue and Tofino will maintain its image as a retreat, extended stay vacation opportunity. Tofino also is a center for the native culture of Clayoqout Sound. It has also over the past decade, developed its own "west coast lifestyle" with young and older individuals from across Canada settling there. Both native and local skills (e.g. Craft) are of interest to the tourist.

The fishing industry is also a part of Tofino's mosaic, however it should be presented more from a lifestyle perspective rather than through the industrial techniques displayed in Ucluelet.

- Bamfield Destination Area Theme
  Theme: Resort
  Area Sub-Theme: Recreation, Conservation

Bamfield shares many of the characteristics of Tofino, but on a much smaller scale. It is both a retreat and retirement area more concerned with conserving an existing way of life than developing a strong recreation/tourism base of destination resorts, restaurants and larger attractions. The conserver attitude in the context of this quaint coastal town, in itself, constitutes an attraction.

3.3 DEVELOPMENT PROGRAMS

Development programs provide dimension to tourism development opportunities, the former being concerned with the experience of the visitor, the latter providing the "opportunity" in the form of a structure or event. Both are established within the context of proposed goals, objectives and principles and respond to the current and future tourism demands. More specifically, they affect each component of the tourism industry; - resource development, attractions, services (food, accommodation) receptive tour operations, special events, information services, retail and recreation services infrastructure, and transportation and human resources.

3.3.1 Resource Development

3.3.1.1 Natural Resources

The natural resources will continue to be the major attraction to the Alberni-Clayoquot Tourism Region. Many of these resources have already been developed by the various parks departments (national, provincial and regional) who offer a traditional mix of campground, picnic areas, trails, boat ramps and access to a specific resource (beach, lake, islands) for the purpose of fishing, swimming, beachcombing, photographing, sightseeing, canoeing/kayaking, etc.

The Regional Tourism Strategy will build on this resource base but expand the product to stimulate new markets and industry growth.

New developments will take the form of man-made attractions which will relate to the natural resource base but will also provide a more directed, structured, engaging and educational travel experience. These new facilities and programs will provide the following benefits:

- a complementary alternative to natural attractions, i.e. parks, beaches, etc.;
- a broader market appeal, i.e. more age groups, higher income and education levels, etc.;
- all-weather, extended season attraction opportunities;
- an appeal to specific tourism trends including - quest for self fulfillment, self improvement and education;
- a more comprehensive travel product for closer to home vacations and mini-vacations;
- more attraction variety to appeal to new market segments and more discriminating customers; and
- a greater flexibility and interest for package tours.

No new parks have been proposed and most future park development will be an existing facility expansion (especially campgrounds).

The Pacific Rim National Park Master Plan will soon be completed and no new development orientation is presently being considered. However discussion with Parks Canada Staff indicate an interest in campground expansion if an agreement can be arranged with local campground operators.

3.3.1.2 Historic/Cultural Resources

Until the recent opening of the Alberni Museum there was no major historic attraction in the region. Nevertheless, the historic base of the region provides ample opportunity for interpretation and attraction development opportunities in the various destination areas including:

- Port Alberni

The initiative displayed in the development of the Alberni Museum, restoration of the Shay Locomotive, etc., should be maintained and centered on:

- the historical attraction components proposed for the Harbour Quay (Shay Locomotive, Heritage Sawmill); and
- a regional Sea-safety museum centered at Port Alberni.

- Ucluelet

The town has had an important fishing industry for the past 50 years. Changes within the industry could be displayed at the MacMillan Island Fisheries Exhibit.

- Tofino

Tofino was named by Spanish Navigators in 1792. The 200th anniversary of this event can be celebrated in eight years, with a nationally focused festival. The town has also been influenced by Japanese and native events each of which can be interpreted by static displays at:

- the Fishermans Village;
- Stubbs Island (Japanese fishing); and
- Christie Residence - 13 Band Native Museum.

- Bamfield

The Bamfield Marine Station can provide interpretive data on its origins as well as that of the former Trans-Pacific Cable Company.

3.3.1.3 Cultural Resources

- Native Culture

Despite the size of native culture within the region, little has been done to interpret its history and available culture resources.

The West Coast native culture is one of the best known in North America and its traditional crafts are the most popular in Canada. Any historical/cultural attraction therefore would seem to interest and draw both Canadian and International travellers.

Interviews with the Nuu-chah-nulth tribal Council indicate a present lack of involvement in the tourism industry until certain land claims issues have been settled.

Nevertheless, there has been recent interest in the development of a Nuu-chah-nulth Cultural Center focusing on the heritage of its 13 Bands.

3.3.2 Attractions

Existing and proposed attractions can serve as a focus or as a base for a multitude of tourism programs. In fact it is more frequently the interpretive, hospitality, entertainment, and educational programs of an attraction that are remembered and subsequently encourage repeat visitation.

Pacific Rim National Park has the most comprehensive program in the region. Using its interpretive facilities and trained staff it provides natural interpretation progams that promote an understanding of the natural resources and Parks Canadas' values. Their Rainy Day program benefits the region by increasing length of stay and user satisfaction.

Programs require little capital expenditure and are labour intensive. Typical tourism progams that may be organized at attractions include:

- Port Alberni Harbour Quay

- Focus on forest industry tours including visits to a restored sawmill, local M & B mill operations and Alberni Museum exhibits;

- Lady Rose II

- Specialty tours or charters reliving the first Spanish navigators in the region; and
- Historic tours highlighting the fishing industry along Alberni Inlet.

- Sproat Lake Water Theme Park

- Day long child-care progams focusing on the particular theme of the park (e.g. Hanna Barbara, Star Wars, etc.).

- Davison Plaza - Ucluelet

- Flea markets, auctions, beer gardens and accompanying entertainment in the plaza area.

- Fishermans Wharf - Tofino

- A public area would be used for constant programming by regional entertainers, craft exhibitors and vendors, festivals, community suppers, etc..

Port Alberni can again play a leadership role in providing program suggestions, structure and technical assistance. It is the only community with a recreation department and experience with a large volunteer base as witnessed by the 23 special events that take place annually in the city.

3.3.3 Services (accommodation, food)

- Programs

Much of the Alberni-Clayoquot tourism plant is made up of "ma and pa" operations and can therefore offer a special level of hospitality and programming.

As examples, Happy Harry's offers on-going animation and hospitality provided by the owner, while the Aquilar House encourages exploration of the surrounding landscape and the West Coast Motel offers videos on rainy days.

Programs are particularly important in this region because of weather. If each motel could keep a portion of its clientele one extra day, because of the programs offered, there would be a significant economic impact on the regional tourism industry.

Possible tourism service programs include:

- Restaurants

- creating special dining events including celebrations of regional historic events, certain west coast dishes, etc.;

- combining food services with entertainment provided by staff, local musicians, actors, etc.;

- providing meals outside the restaurant during special events, for instance the Loft could cater a meal in the public space of the proposed Fishermans Village;

- linking ("tie-ins") the restaurant services with certain attractions, e.g. brunch at Hot Springs Cove served and prepared by the Clayoquot Lodge; and

- destination resorts without restaurants, such as Ocean Village, could program a special event in collaboration with local restaurants.

- Motels

Possible programs include:

- providing transportation services to local attractions; and

- arranging special prices for certain events, services (e.g. charter boats, sightseeing tours).

The Alberni Clayoquot Region is in direct competition with other areas of the province for market share. Since it is a new destination region it must "try harder" and in the service component that means offering more than just food and shelter but rather a comprehensive and unique tourism experience.

- Product Quality

While it is possible to find reasonable food and accommodation in the region the overall rating of services is moderate - when compared to the competive regions of Parksville-Oualicum, the Gulf Islands or Long Beach, WA.

For instance, what is considered high-end, quality accommodation in Alberni-Clayoquot (Pacific Sands, Ocean Village) is only acceptable when compared to the Qualicum College Inn, the Schooner Cove Inn - Nanaimo, Hastings House Ganges or the new Long Beach Convention Center in Washington.

Certain facilities can be selected for immediate product upgrading including the Apoloma Motel, the food at the Wick Restaurant, the Campground at Pacific Rim Resorts (Cox Bay), or an upscale restaurant at the Golf Course.

Quality and competitive standards should be established by the local industry in collaboration with the Sub-Regional Tourism Association.

3.3.4 Receptive Tour Operations (tour packages)

- The Operation

The study area has abundant opportunity for numerous types of local receptive tour operations. Available accommodation and restaurant services combine with existing and proposed charter services, cruise boats, natural and man-made attractions, scenic resources, nature interpretation programs, etc., suggest a variety of exclusive regional tour packages or component tours to Vancouver Island. It is necessary however to put the packages together and market them. To date this has only been done on a significant scale by two tour operators - The Canadian Princess (Ucluelet, Victoria) and Mavrick Coachlines (Vancouver). Ideally a local independent receptive tour operations should be established. If this does not occur naturally it should be stimulated by the Sub-Regional Tourism Association. If a private operator (e.g. local bus line or motel operator) still does not emerge, the Association will have to work with local suppliers to develop travel packages that will be sold by:

- tour operators (e.g. Vancouver, Seattle, Calgary);
- wholesalers (e.g. those presently selling the British Columbia/ Vancouver destination); and
- travel clubs and associations (e.g. special interest products such as diving, whale watching, etc.).

Alberta-British Columbia attracts most (40% to 45%) of the package tours in Canada. This is largely due to the popularity of the scenic resources of the Rocky Mountains and scenic tours are the most popular of all types of tour packages. Alberni-Clayoquots' exceptional scenery therefore provides a theme for a variety of land and water based tour packages.

Tour packages offer advantages to both the customer (cost efficient, preplanned, convenient, etc.) and to the region (shoulder season travel, increased visitation and length of stay, etc.) and consequently are an essential part of this regional tourism strategy.

A number of package types could be made available as suggested in Table 3-2 which follows.

PACKAGE TYPES	FEATURES	ORIGIN	MARKETS	SPONSOR	DURATION
Bus Tours - escorted - partially escorted	1. Long Beach Tour Tour of National Park, beach party, Ucluelet/Tofino attractions 1 night each in Tofino/Ucluelet	Vancouver Victoria Seattle Nanaimo	- outdoor enthusiasts - individuals - seniors - broad market segments - extended weekenders	bus lines tour operator	2 - 3 days
	2. Pacific Rim Sightseeing Port Alberni (Harbourfront) Lady Rose to Bamfield/Ucluelet, Long Beach, beach party, attractions of Tofino/Ucluelet, 1 night Tofino/Ucluelet, 2 nights Port Alberni	Vancouver Victoria Seattle Port Alberni Interior B.C.	- photographers - sightseers - empty nesters - seniors	bus lines tour operators	4 - 5 days
	3. Whale Observation MacMillan Island Exhibit, Community Supper, 1 night Ucluelet, boat charter, entertainment and 1 night accommodation/Tofino	Vancouver Victoria Seattle	- marine enthusiasts - small groups - nature lovers - young couples - professionals	bus lines boat charters tour operators	2 - 3 days
	4. Fishing/Nature Interpretation 1 night - Port Alberni, fishing Barkley Sound, 1 night Ucluelet - fishing/nature interpretation 2 nights Tofino - Nature interpretation Clayoquot Sound	Vancouver Victoria Seattle Port Alberni	- anglers - marine enthusiasts - sightseers - mature adults	bus lines boat charters hotel operators	5 - 6 days

Table 3-2
Possible Tour Packages to Alberni Clayoquot

PACKAGE TYPES	FEATURES	ORIGIN	MARKETS	SPONSOR	DURATION
Specialty Tours - escorted	1. Marine Mammal Observation Marine Station (Bamfield) workshop, community supper, 1 night Bamfield, boat charters, fisheries exhibit Ucluelet, 1 night Ucluelet	Vancouver Victoria Seattle Calgary	- marine biologists - academics - couples - mature adults - environmentalists	marine station hotel operator boat cruise bus line tour operator nature societies	4 - 5 days
	2. Native Craft/Culture Seminar, 1 night, Port Alberni, craft workshop - Tofino, boat tour-Nootka and Clayoquot Sound, 2 nights Tofino-potlach, native entertainment	Vancouver Victoria Seattle Portland Port Alberni Eastern Canada International	- native groups - students - mature adults - craft enthusiasts - europeans	native council bands Christie Residence bus lines	3 - 4 days
	3. Coastal Christmas 2 nights Destination Resort, entertainment, boat cruise/air transportation to Hot Springs Cove	Vancouver Victoria	- small groups - singles - couples - young professionals - outdoor enthusiasts	resorts bus lines social/cultural associations	3 days
Post Conference Tours - escorted	1. British Columbias West Coast Travel to Port Alberni, Harbourfront, Lady Rose to Bamfield, 1 night-Ucluelet, 1 night-Tofino. attractions, Long Beach, Meares Island, Clayoquot Sound	Vancouver Victoria	- business travellers - mature adults - couples - professionals	corporations tour operators	3 - 4 days

PACKAGE TYPES	FEATURES	ORIGIN	MARKETS	SPONSOR	DURATION
Incentive Travel - escorted or unescorted	1. Pacific Discovery entertainment, 1 night Port Alberni, Lady Rose to Barkley Sound, Ucluelet 1 night Ucluelet, Long Beach 2 night Destination Resort	Vancouver Victoria Calgary	- small groups - sales staff	corporations commercial account travel agents	4-5 days
	2. West Coast Retreat 3 nights at beach destination resort featuring tours of Native Museum, Hots Spring Cove, Barkley Sound, Clayoquot Sound	Vancouver Victoria Okanagan Valley	- small groups - management personnel	corporations	4 days
Fly/Drive - unescorted	1. Pacific Rim Adventure Fly to Port Alberni, car rental entertainment 1 night Port Alberni, drive to coast 4 nights Ucluelet/Tofino, community suppers, visit attractions, boat tour - Clayoquot/Barkley Sound	Vancouver Okanagan Valley Calgary Edmonton	- affluent empty nesters - young professional couples	wholesalers tour operators airlines hotel operators	6-7 days
escorted	2. Salmon Fishing the Coast Fly to Tofino - 2 days in Barkley Sound, 1 day in Clayoquot Sound - 2 nights Ucluelet, 1 night Tofino, entertainment community suppers	Vancouver Central B.C. Calgary	- anglers - professional males - affluent outdoor recreation couples	wholesalers tour operators regional airlines	5-6 days

PACKAGE TYPES	FEATURES	ORIGIN	MARKETS	SPONSOR	DURATION
Local Attractions - escorted	1. Parks and Camping Tour a one week tour of park attractions (including camping equipment), 1 day each in Sproat Lake, Bamfield, Toquart Bay and two days in Pacific Rim National Park. Including interpretation programs, kayaking, group suppers etc.	Central B.C. Vancouver Alberta	- outdoor recreationalists - ecology/nature association members - youth groups - outdoor recreation clubs - municipal recreation departments	Parks Canada tour boat suppliers tour operator	5-7 days
	2. Pacific Rim Attractions 2 nights in Port Alberni (Harbourfront, Mars Bombers, Lady Rose), 2 nights Tofino/Ucluelet (MacMillan Island, Pacific Rim, N.P., Fishermans Village Hot Springs Cove	Vancouver Victoria Central B.C.	- seniors - empty nesters - individuals - broad market segments	tour operator attraction operators Regional Travel Association	7-9 days
	3. Water Attractions 1 night in Port Alberni - 2 days in Barkley Sound, accommodation Ucluelet/Bamfield, 2 days Clayoquot - Nootka Sound, accommodation in Tofino ground transportation to Port Alberni	Port Alberni Victoria Vancouver	- marine enthusiasts - professional couples - affluent empty-nesters	boat operators tour operators	7-9 days
	4. Local Festival/Special Event Tofino Craft Fair, 1 night in Port Alberni, visit Rollin Art Gallery, Long Beach, Fishermans Village, 1 night Tofino - Craft Fair (1 day)	Vancouver Victoria	- craft shoppers - arts and culture enthusiasts - seniors - mature adult couples	tour operators	2-3 days

3.3.5 Special Events, Festivals, Staged Attractions

Special events offer some of the best opportunities for development progams. In fact the visitors are essentially drawn to the event for its entertainment, socio-cultural and educational activities and values.

Tourism is a human experience and the variety of available events should reflect the needs of the market and the cultural expression of the local people.

The existing special events and stage attractions have been particularly popular in Port Alberni, and attract many visitors while Ukee Days and Clayoquot Days have been designed more for the community than the traveller. Nevertheless these events could be enlarged to include more activities for the travellers (e.g. craft sales, specialty suppers, tours, etc.).

Port Alberni has become known across the province for its Salmon Derby and related activities but tourists visit the Tofino and Ucluelet events more by chance than by design.

There is then a need for more tourist centered special events including sports, education, history, industry, entertainment etc. Emphasis should be on having these events in the shoulder season when travel volumes are low and facilities and volunteers are more available. The following are three special events proposals.

Proposal 1

The coastline unit needs one provincially recognized event such as "The Pacific Rim Pageant". This would however require the combined efforts of Ucluelet, Pacific Rim National Park and Tofino. The theme could possibly be "Man And The Sea" or a similar approach that seeks to expose the visitors to the relationship between coastal society and the Pacific marine environment. The theme could be expressed by the following events:

- **Coastal Society**

- regional crafts exhibit/sales
- gourmet seafood suppers
- lifestyle theatre
- entertainment
- open houses-an afternoon with "a local"

- **Marine Environment**

- review of the fishing fleet
- fish processing tours
- fishing and nature interpretation charters
- marine environment workshops

- **Shoreline**

- nature interpretation walks
- beach marathon

Proposal 2

If it is logistically not possible to organize a dual community event, Tofino and Ucluelet should organize separately, but again, at such a scale as to eventually be recognized throughout the primary market area and to be a draw in itself.

- **Ucluelet**

The fishing industry offers much appeal and opportunity for staged attractions:

- Activities:
  - presentation of the fleet
  - "open house"
  - gourmet seafood suppers

- deep-sea fishing charters
- boat building exhibits
- Coast Guard display

- Facilities:
- MacMillan Island - Fisheries Exhibit
- Canadian Princess Resort Area
- schools, streets, Davison Plaza

- Tofino

The community has already had a brief exposure to a well attended "craft fair" in 1980. The negative factors that terminated that event no longer seem evident and the opportunity to revitalize the festival seems possible. It would include:

- Activities:
- craft displays, workshops
- sales
- entertainment/theatre
- community suppers

- Facilities:
- park
- nurses' residence
- Fishermens Village

It must be emphasized that these staged attractions require as much community energy as preparing for the development of a major physical attraction such as the Fishermans Village or the MacMillan Island Fisheries Exhibit.

Proposal 3

Off-season events could prove popular with both primary market travellers and local operators. Extended stay events (at discount prices) focusing on New Years, Christmas, Spring, Whales, etc., etc., could become annual events for many and provide a certain cash flow in the off season.

3.3.6 Information Services

Information within the region is lacking and only Port Alberni has a distinguishable and accessible tourist information center. Similar levels of information dissemination are required at both the regional level as well as in Ucluelet and Tofino.

3.3.6.1 Facilities

a) Regional Tourism Information Centre

A regional information center, under the direction of the Sub-Regional Tourism Association is essential for comprehensive and equitable information transfer to the traveller.

Two sites have been considered:

- Arrowsmith Road;
- Cathedral Grove (entrance to Region); and
- Existing Port Alberni-Chamber of Commerce Facility on Route 4.

The second alternative is considered the most realistic for the short-immediate term while the long term goal would be to establish a distinct facility in the appealing off-road location within Cathedral Grove.

The new Port Alberni information centre is attractive and capable (with modification) of supporting both a Port Alberni and Regional Tourism Information Center.

This option becomes even more realistic when a secondary Port Alberni information center is built at Harbour Quay. The coexistence of the two outlets will also prove beneficial to Port

Alberni since the regional facility will include a reservations center. For example, when accommodation is full on the coast the traveller may be referred immediately to the Port Alberni representative for local lodging selection.

Interior design should reflect the four regional destination areas by providing a layout and graphics that segment their individual charm yet demonstrate the exciting water and land links between them.

- Promotional Material

A variety of traditional and contemporary promotion materials will be available in the Information Centre, including:

- A Regional Tourism Brochure

The Sub-Regional Tourism Association will produce a full colour brochure describing the attractions, destination areas and travel corridors of the region. It could be designed with pull-outs on each destination area that can be used for individual publicity. This document will essentially be used for promotion in the primary and secondary markets.

- Video

A video similar to that suggested by the Port Alberni Harbour Commission would be produced demonstrating commercial operations and attractions. This will allow a visitor to chose from the array of room styles, restaurant types and site locations.

- Slide Presentation

A continuous slide show presentation on the land/seascape resources will be shown.

Pamphlets from individual operators will also be available.

b) Destination Area Information Centres

Each destination area will have its own facility, located in proximity to a major attraction or service.

Ucluelet - as part of the Canadian Princess
Tofino - Fishermans Village
Bamfield - adjacent to Wheelhouse Dining Room

The present Ucluelet service at the Route 4 intersection will be replaced by a comprehensive static display that will orient the automobilist to the attractions and services of the entire Ucluelet/Tofino coastline unit including Barkley and Clayoquot Sound and Kennedy Lake.

The display will include maps, photographs, and air photos. It will be paid for by the local suppliers. Documents released by TIDSA on Information Centers is an excellent guide book.

3.3.7 Retail and Recreation Services

No new specific recreation/retail outlets are being planned for the region, however there is opportunity for upgrading of existing retail/recreation services.

- Streetscape Renovation

The two most important retail streets in the region (Port Alberni's Third Avenue and Peninsula Blvd. in Ucluelet) require streetscaping to become more appealing to travellers and improve the image of the community. Port Alberni has already made a commendable effort on Third Avenue. When Harbour Quay is completed it should coincide with a streetscape development, on Third Avenue and Argyle Street that respects the quality established along the new waterfront. Johnstone Avenue which is also heavily used by entering tourists should be streetscaped following completion of the downtown area.

Retail storefronts could change their facades to reflect the motif of Harbour Quay and heighten the visitors' perception of Port Alberni as a major service/forestry community with a colourful tourism orientation.

Ucluelet's Peninsula Ave. requires a clean-up, streetscaping (tree planting, street furniture, flags, signs, potted flowers upgraded sidewalks, etc.) and improvements to the facades of stores, offices, garages, etc.

Retail stores should project a character similar to the Loft (Tofino), and the Whales Tale of the Treasure Chest (Ucluelet).

Architectural motifs should have a constant use of weather-worn wooden facades, highlighted by solid colours.

Site planning should emphasize the protection of natural features, proper orientation for views and the buffering of parking lots.

When possible, tourist retail outlets should be clustered around an attraction such as:

- Harbour Quay and Argyle St./Third Ave.
- MacMillan Island Exhibit/Canadian Princess
- Fishermens Wharf
- Bamfield Boardwalk

3.3.8 Transportation

3.3.8.1 Roads

- Route 4

The paving of Route 4 has been the most important factor in establishing Alberni-Clayoquot as a tourism destination. Despite the challenges presented by the existing alignment, the road adequately responds to demand. Present upgrading schedule for the stretch between the National Park and Tofino should remove many final difficulties.

- Bamfield

MacMillan Bloedel, in collaboration with the Ministry of Transportation and Highways, should keep it graded on a weekly basis in anticipation of a regular flow of recreation vehicles to Bamfield once the Bamfield Campground has been opened.

- Cowichan Valley Road

This road should be made more attractive to the visitor arriving from Victoria. Minor upgrading including dust control and chip sealing would promote this as a secondary access to the southern end of the region. It also creates the possibility of a Victoria/Port Alberni circle tour, including the Island Highway.

- Comox Road

This road requires considerably more upgrading than the Cowichan Road, however it could represent a significant time saving (1/2 - 3/4 hr.) for travellers from Campbell River. There would also seem to be a number of other economic reasons to shorten the link with the northern part of the island. Although this access would not increase visitation appreciably, it would provide a reasonable alternative for North Island tourists and for tourists travelling the Prince Rupert/Port Hardy ferry route.

- Logging Roads

The former MacMillan Bloedel maps of logging roads should be updated by the forestry companies, printed and be made available to the public.

3.3.8.2 Signage

Inadequate signage is the most important transportation issue in the region. Starting at the Island Highway, there is no signage (other than highway regulation signs and a Canadian Princess Sign on an Indian Reserve) to guide the traveller to the various facilities.

This problem is evident throughout the region but particularly accute in the Port Alberni Destination Area where many attractions and services are spread out over a large area.

A sign program is required for both the Region and within each Destination Area. A comprehensive program consists of the following:

a) Directional Signs:

- regional
- destination area
- individual facilities;

b) Promotional Signs; and

c) Indication/Identification Signs.

The following signage is proposed for the region and Port Alberni.

REGIONAL SIGNAGE

The types and use of signs are under the direction and policy of the Ministry of Transportation and Highways. The promotion signs have been designed to respect the motif of that proposed by the

Ministry, however Regional directional signs would have their own character. A Tourism pilot signage program is proposed that would allow the region to express its individuality as well as provide proper direction.

a) Directional Signs (Regioral)

- to Pacific Rim Tourism Region, located on Island Highway at intersection with Route 4 (see Figure 3-3a, example 1);

- to Port Alberni Destination Area, located on Route 4;

- to Bamfield Destination Area, located on Bamfield Road; and

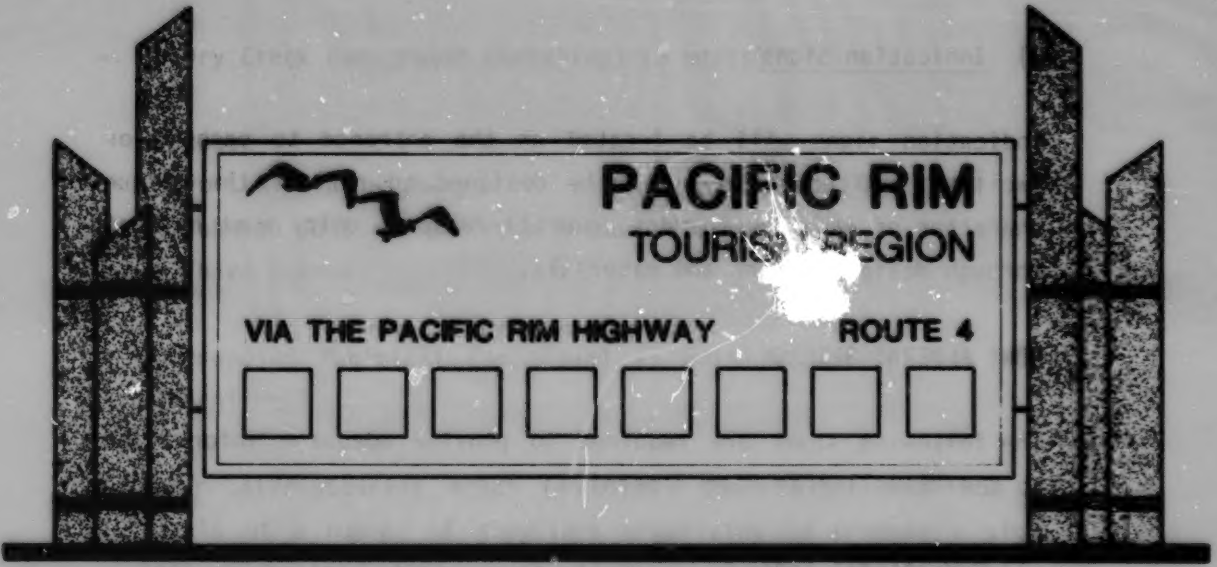
- to Ucluelet and Tofino Destination Areas located at the Route 4 T - intersection.

- Destination Signs (Facilities)

- to be located appropriately when approaching a single or a group of attractions or services. For example, to Fishermans Wharf, a sign would be located on Route 4 entering Tofino and again to direct travellers to its waterfront location.

b) Promotional Signs

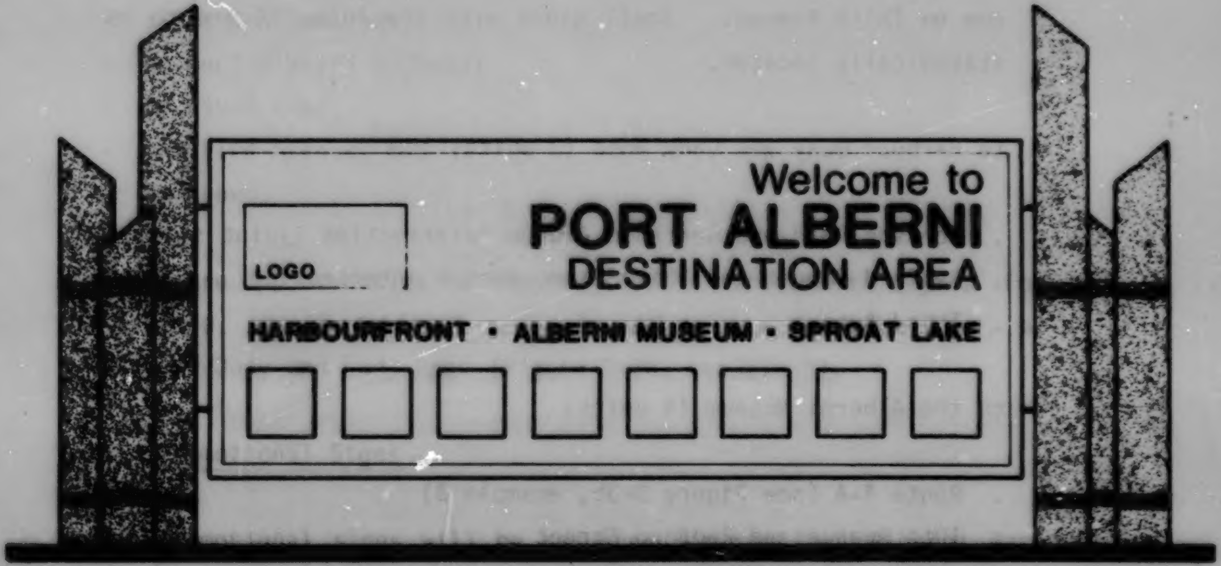
A large, characteristic sign at the entrance to each destination area will be constructed. Figure 3-3a, example 2, shows a typical layout that is in keeping with the overall sign design for the region.



1

Regional Promotional Sign

Location: Island Highway



2

Destination Area Information Sign

Location: Route 4

Figure 3-3a

c) Indication Signs

Indication signs will be located at the entrance to each major facility. Although they will be designed to reflect the unique character of each development, overall regional unity must be kept through design quality and materials.

PORT ALBERNI SIGNAGE

The following signs are required to provide adequate information to the traveller in Port Alberni.

a) Directional Signs

- to the Port Alberni Destination Area (2 units) on Route 4 (east and west).
- to Tourist Information Center (3 units) - two on Route 4 and one on Third Avenue. Small signs with the logo "?" are to be stategically located.
- to Harbour Quay and Lady Rose (3 units)
  - Johnson Road and Gertrude Avenue intersection (joint sign)
  - Redford Street and Third/Stamp Avenue intersection
  - Third Avenue
- to the Alberni Museum (4 units)
  - Route 4-A (see Figure 3-3b, example 3)
  - 10th Avenue and Redford Street
  - Johnson Road and Gertrude Avenue (joint sign)
  - Gertrude Avenue and Redford Street

- To Dry Creek Campground (existing) (3 units)
  - Route 4
  - Port Alberni Highway
  - Johnson Road and Gertrude Avenue (joint sign)
  - Third Avenue

- To proposed Municipal Campground (1 unit) - across from the Alberni Mall.

- To "motel/restaurant area" (4 units) these signs would be a result of a number of suppliers organizing to produce a sign that recognized their area as a clustering of facilities (Figure 3-3b, example 4).

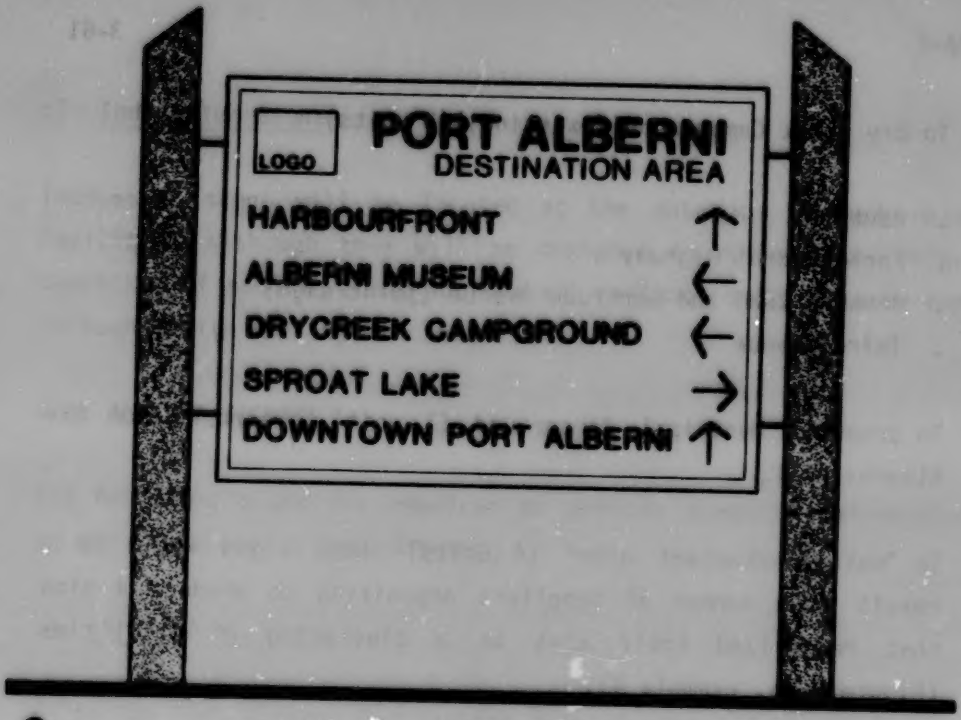
In Port Alberni, these facilities tend to be scattered, however; groupings could be identified, for example:

- along Johnson Road;
- on Port Alberni Highway;
- on River Road;
- on Third Avenue; and
- downtown.

There are opportunities to combine certain directional signs. For instance, the directional sign, to China Creek and Bamfield, or Harbour Quay and Lady Rose (Figure 3-3b, example 3).

b) Promotional Signs

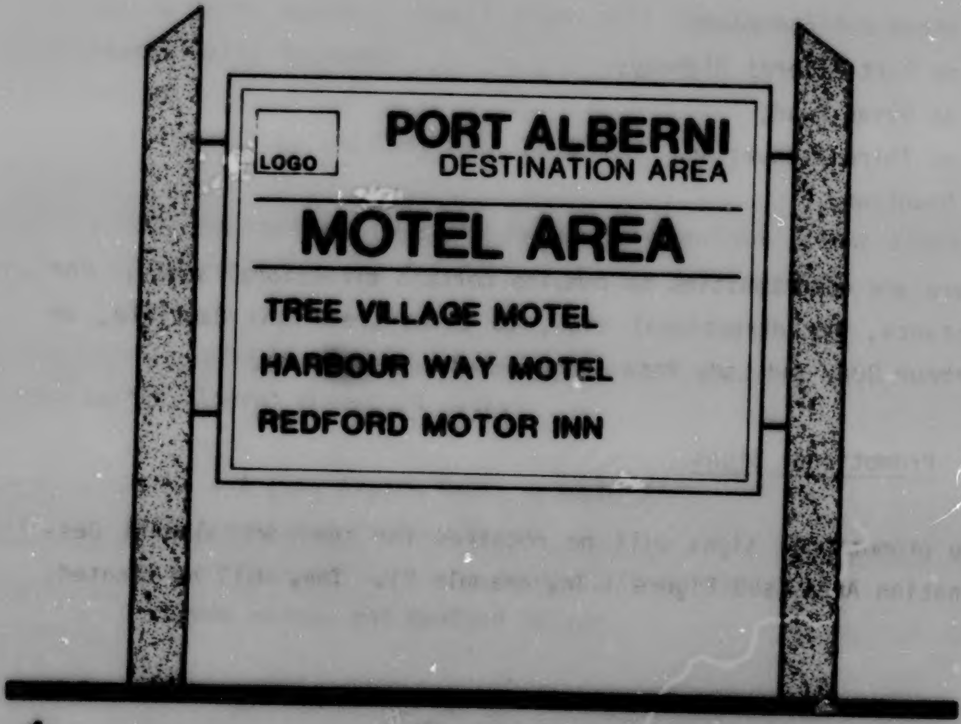
Two promotional signs will be required for the Port Alberni Destination Area (see Figure 3-3a, example 2). They will be located:



3

Destination Area Direction Sign

Location: Route 4A



4

Destination Area Information Sign

Location: Redford Street

Figure 3-3b

- entering the area from east at a point 1.5 km west of Stokes Creek; and
- entering the area from the west at Friesen Creek.

c) Indication Signs

Indication signs will be located at the entrance to each attraction. One will be required for the:

- Harbour Quay;
- Downtown Area;
- Lady Rose; and
- Alberni Museum.

While all the directional signs should have a set motif, the indication signs are allowed to differ and reflect their own identify. For instance the Harbour Quay Sign will reflect the forestry industry and be designed on wood while the MacMillan Island exhibit could use metal and combine elements from the fishing industry as part of its sign (buoys, anchor, nets, etc.) It is anticipated however that each must maintain an overall level of quality.

Figure 3-4 outlines the sign requirements for Port Alberni. Sign construction and installation are excellent make work projects.

• Overall Sign Guidelines

- The overall sign motif for Port Alberni and the region must express a marine/forest character using large timbers and poles as a backdrop to clean, contemporary metal letterings.

- The larger "motif" signs are to be supported by smaller signs (logo, name and arrow only) located along the route to each attraction.

FIGURE 3-4

SIGNAGE PROGRAM - PORT ALBERNI

TYPE	INFORMATION	NUMBER	UNIT COST
Directional	- To Port Alberni Destination Area		$ 3,000
	- To Tourist Information Center	3	3,000
	- To Harbour Quay/Lady Rose	2	2,000
	- Joint Sign - Johnston Road	1	6,000
	- To Alberni Museum	4	1,800
	- To Dry Creek Campground I	3	1,400
	- To Dry Creek Campground	1	1,400
	- To China Creek/Bamfield	2	1,400
	- To motel/hotel area	5	1,000
Promotional	Welcome to		
	- Port Alberni Destination Area	2	4,500
	- to Harbour Quay	1	4,500
Indication	- Harbour Quay	1	4,000
	- Alberni Museum	1	3,000
	- Motel area	3	1,400
	- Dry Creek Campground	1	1,000
Support	- Logo, name, arrow, attachments	15	250
(double to include installation)		TOTAL	$67,650

- Logos are to be prepared for:
  - the Pacific Rim Tourism Region
  - each Destination Area (4)
  - major attractions
- All future sign designs and locations must be reviewed by a committee of the Sub-Regional Tourism Assocation, RDA-C and the Ministry of Transportation and Highways.

3.3.9 Infrastructure

- Water and Sewer

The major infrastructure developments that have taken place in Tofino and Ucluelet adequately respond to community growth requirements to the end of the year 2000 and to projected tourism growth over the next 10 years.

The highest population projection scenario for the District Municipality of Tofino, Clayoquot Sound Water Works District and Ucluelet has been applied, i.e. the doubling of the population over the next 20 years. This will meet the developments proposed in the tourism strategy.

While the new infrastructure development serves the tourism development areas of Tofino, and extension of water and sewer in Ucluelet to Willow Brae and Millstream (Area "C") would provide for future development on the Ucluelet Inlet and in the vicinity of I.R. #6.

Bamfield has only one major development project planned which will have its independent community water and dry pit system.

Although tourism growth is projected in Port Alberni, visitors will mostly occupy the existing tourism plant.

- Community Costs

Each community will incur infrastructure costs with the construction of each new attraction or service. These costs are anticipated to be acceptable, however, since each proposed development opportunity is close to existing infrastructure routes.

- Airports

- Tofino

The Tofino Airport will become more popular as the region becomes more organized for the reception of tour packages.

While there is little chance that the facility will be equipped for larger commercial jets (i.e. 737) there will be more frequent landings of Dash 7 or Dash 8's and similar aircraft.

There is therefore a requirement to add IFR equipment in order to improve passenger safety and respond to increased scheduled and non-scheduled traffic.

While it is anticipated that most visitors arriving by air will be part of a charter, and consequently taken to their resort, minimal reception facilities are required.

- Port Alberni

A new airport for Port Alberni would provide an important new access to both the city and the region. Specifically, it would be possible to bring in air charters directly from Vancouver/Victoria, Seattle, Interior B.C. and even Calgary/Edmonton, as part of fly-drive packages or tours of the region originating in Port Alberni. Promoting Port alberni as a staging area is important to adding additional visitor nights to the cities over supply of accommodation units. Airport facilities greatly increase Port Alberni's opportunites to sell its staging role to the tour operators as well as achieve its potential as a major sportsfishing center ("the Salmon Capital") on the west coast of Vancouver Island.

Tourism itself, will not make a new airport viable over the next 10-15 years however, it should be considered as an important factor when analysing the overall feasibility of an airport development.

3.3.10 Human Resources

Tourism is a relatively recent phenomenon in the region and therefore acquired knowledge by attraction and service suppliers, is not as developed as other (competitive) areas in the province. There are, however, a number of individuals with progressive ideas and a comprehensive understanding of the travel industry. In some cases they operate their own establishments (e.g. Pacific Sands, Timberlodge) or they work for government (e.g. Parks Canada). These individuals constitute an imporant human resource base for regional tourism development.

Nevertheless, following disussions with a number of operators, on such subjects as management and product development, by observing the general low level of marketing efforts and by investigating the properties that went into receivership during this study, it becomes evident that ongoing training and upgrading courses are required in the region.

Three subject areas should be considered:

a) product marketing and development;
b) property management;
c) hospitality training; and
d) business management.

a) Product Marketing/Development, would encompass such subjects as:

- marketing research techniques and questionnaires

- target markets definition/segmentation
- tourism industry trends, issues
- sales forecasting
- advertising/public relations
- new market opportunity identification
- new product analysis and planning
- pricing policy

b) Property Management

- business management and planning
- facility operation and maintenance
- budgetting and reporting (financial management)
- in-service training and staff management
- food and beverage production and services
- computer technology

c) Hospitality Training

Hospitality training for existing and future staff will be an important aspect to improving the quality of the regions travel product.

- Training Sources

Training or "retraining" has become a key word in government economic policy in the mid '80's. Consequently there are a variety of available federal and provincial employment programs that allow access to training funds. In the past, these monies have been focused on manufacturing and technology, however the recent heightened interest in tourism at the federal level allows greater access to funds for tourism training through CEIC.

Funds/expertise are available from the following sources:

- the Canadian Employment and Immigration Commission
  - Canada Manpower Industrial Training

  - Canada Manpower Adjustment Program
  - Training-on-the-Job
- Department of Regional Industrial Expansion
- Special ARDA (Indian Training)
- Federal Business Development Bank
- Counselling Assistance to Small Enterprises (MISBD)
- Management Seminars (MISBD)
- Courses could be given by qualified individuals from Tourism B.C. or by experts within the industry through the North Island Community College Extension Program.

- Technical Assistance

On-going technical assistance should be available to the Regional Tourism Association or group of attraction/service operations or an individual supplier.

The resource facilitator may be selected from a variety of sources including, M.I.S.B.D., Tourism B.C., Tourism Canada, a university or community college, or from private industry (operator, consultant etc.).

Assistance could be provided on financial feasibility, marketing, promotion, facility planning and design, etc.

- Tourism Resource Manual

A written document should be prepared for members of the tourism industry in the region. It should include but not be limited to the following subjects:

- opportunity indentification
- market anlaysis/segmentation/differentiation
- tourist needs and requirements
- promotion campaign (community, operator)
- site planning and development
- bibliography of tourism literature

- **Tourism Resource Library**

The Sub-Regional Tourism Association will acquire pertinent books, travel trade journals, tourism research material, etc. to be made available to the regional travel industry.

3.4 DEVELOPMENT OPPORTUNITIES

The Background Report identifies a number of development opportunities based on:

- project proposals by individuals
- consultant identification
- market opportunity

The individual projects were assessed in an evaluation matrix (see Appendix I), the final projects selected for importance and implementation priority. The selected projects are presented according to:

- theme associations
- component (attraction, servcies, etc.)
- development responsibility
- project description

This section will be followed by a preliminary financial analysis of selected opportunities.

3.4.1 Port Alberni Destination Area

ALBERNI INLET UNIT
GREAT CENTRAL LAKE/STAMP FALLS UNIT
MOUNT ARROWSMITH UNIT

3.4.1.1 Harbour Quay

Theme: Pacific Forest Industry
Cost: $980,000
Category: Attraction
Responsibility:
- City of Port Alberni
- Port Alberni Harbour Commission
- Private operators
- Alberni Valley Museum
- Maritime Heritage Society

- **Project Description**

Harbour Quay is the most important tourism development to take place in the region since the dedication of Pacific Rim National Park. Not only does it confirm Port Alberni's Primary Destination role in the development strategy but it also serves as:

- a focus to tourism development for the Port Alberni Destination Area;
- an important staging area for regional tourism development; and
- an example of a quality tourism development project.

The final proposed product is well conceived combining attractive architecture, a healthy mix of attraction and retail, with a strong link to the downtown core for additional economic spin-offs.

The project is adequately described in a TIDSA report - "Port Alberni Harbour Quay - Feasibility and Design Study for a Tourist Attraction" and that information will not be repeated here.

The existing project with its market square, retail facilities, and observation tower, represents a solid and well conceived base for a first class tourism attraction. However the development does not go far enough to assume its success as a major provincial attraction. Several additional features have been suggested, however that would enable Harbour Quay to fulfill its potential as a major destination attraction.

All funds for this development have been spent and additional monies would have to be generated from the municipality, senior governments as well as through public solicitation of contributions and volunteer labour.

The Alberni Valley Museum and the Santiago Committee have produced a document - "A Master Plan Concept for Port Alberni's Waterfront Heritage Development".

The comprehensive and exciting document suggests several important heritage developments which would lead to a more provincially important attraction. They include: the operation of the Two Spot Shay Locomotive; and the reconstruction of the Heritage Sawmill. The study also outlines sea and waterway or maritime exploration and trade heritage interpretive exhibits. This includes the opportunity for a historic boat reconstruction. The study does not outline a specific time schedule, however it suggests a time-line of 5 to 8 years.

Due to present over supply conditions in the city, the accommodation proposals should not be considered for several years or until travel growth has changed the present economic condition of these sectors.

In summary then, this project has to become a true visitor attraction and the energies of those responsible for the project must go to raising the extra capital to meet the attractions objectives.

Action: 1. **Form a Second Phase Harbour Quay Attraction Committee including:**
- **City of Port Alberni**
- **Harbour Commission**
- **Alberni Museum**
- **Historical Society**

2. **Using the existing Alberni Museum Heritage Master Plan, outline a development schedule.**
3. **Commence a fund raising campaign to acquire both money and material appealing to private business/foundations, citizens and government.**

3.4.1.2 Lady Rose II

Theme: Pacific Marine
Component: Attraction
Cost: $250,000 (used)
Responsibilty: private operator (possible government support through continued cargo subsidy).

- **Project Description**

Using the facilities and marketing and management skills of the existing Lady Rose operation, a second (smaller) boat could be run to Bamfield, and the existing boat used daily to Ucluelet.

A second boat out of Port Alberni would:

- strengthen Port Alberni's role as a staging area;
- create additional opportunities for Port Alberni based package tours;
- allow Lady Rose I more days to function in a Port Alberni - Ucluelet - Port Alberni (ground) travel circuit;
- provide better service to users of the West Coast Trail; and
- support more "passive" visits (as compared to automobile) to Bamfield in keeping with its conserver ethic.

The project then represents one of the most viable cruise/boat charter options in the region.

Action: 1. **Investigate available used equipment.**
2. **Continue to market existing cruises.**
3. **Prepare for increased demand following the opening of Harbour Quay and Expo 86.**

3.4.1.3 Sea Safety Museum Collaborative

Theme: Pacific Marine History (Shipping)
Cost: $250,000
Responsibility: - City of Port Alberni
- Regional District of Alberni Clayoquot
- Port Alberni Harbour Commission

- **Project Description**

This museum would "commemorate historic and contemporary services and facilities throughout the regional district devoted to the safety of ships, sailors and the environment"[1].

The project would link, via a central museum at Harbour Quay and static displays at Bamfield (Boardwalk), Ucluelet (MacMillan Island) and Tofino (Fishermans Village) the various components that made up the safety network, including:

- the West Coast Trail
- existing lighthouses (5)
- Canadian Coast Guard Life Boat Stations (Bamfield, Tofino)
- Canadian Marine Rescue Auxiliaries
- Bamfield Red Cross Outpost
- Vessel Traffic Management Center
- Vessel Stations at Port Alberni
- Bamfield, 38 foot double ended lifeboat

The museum and static displays would demonstrate the dangers of the Pacific Coast ("Graveyard of the Pacific") within the region and the variety of communities and services involved in protecting the users of these west coast shipping lanes and fishing areas.

The museum and static displays are best located with existing or proposed attractions such as Harbour Quay or the MacMillan Island Exhibit since they add to the dynamics of these facilities.

This study acknowledges the uniqueness of such a facility and consequently the possible publicity for Port Alberni and the Tourism Region.

Action: 1. Similar to acquiring other historic components for Harbour Quay, however must include other communities.

2. Continue research.

---

[1] Memo prepared by W.J. Blakely and Associates on a proposal for a Sea-Safety Museum.

3.4.1.4 Mill Tours

Theme: Forest Industry
Component: Attraction/Event
Cost $15,000
Responsibility: - MacMillan Bloedel (various divisions)
- Regional Tourism Association

- Project Description

While mill tours were available in the late '70's they were not available during the mill shutdown and subsequently have not been fully promoted. The proximity of the four mills (M & B Alberni Plywood Division, M & B Sawmill, Alberni Pacific, M & B Sawmill and Shingle Mill (Somass Division) and M & B Pulp and Paper Division) to Harbour Quay and the Two Spot Locomotive tracks means that tours can be easily promoted and accessed.

$15,000 will be allocated initially for printed material and administration.

Action: 1. Initiate meetings between the Forest Industry and the City of Port Alberni to discuss roles and responsibilities of each in implementing and promoting tours.

3.4.1.5 Downtown Renovation/Argyle Street/Third Avenue

Theme: Modern Forestry Town
Cost: $300,000 to $600,000
Component: Retail Service
Responsibility: - Downtown Merchants Association
- Individual Retail Businesses
- City of Port Alberni

- Project Description

Both Argyle Street and Third Avenue will be given a thematic "facelift" to reflect the character of Harbour Quay. Coordinated street signs, sidewalk treatment, treeplanting and streetscape furniture will combine with a backdrop of renovated storefronts that reflect:

- wooden facade motif
- generous use of marine, forestry and shipping fixtures
- colourful, contemporary banners and lights

Argyle Street will become the link between the poles created by the Third Avenue retail and the Harbour Quay Attractions.

Third Avenue will be programmed to complement the activities at Harbour Quay. Certain stores will accent gifts and souvenirs from the forest industry and on special occasions staff will dress in period costumes. Portable stage units will be available and the street will be closed for special occasions.

Action: **1. Following the completion of Harbour Quay, in 1988, an action committee consisting of the City, Chamber of Commerce and Downtown Merchants should be established to outline streetscape revitalization.**
2. Prepare a Master Plan.
3. Implement by 1990.

3.4.1.6 Municipal Campground

Theme: Outdoor Recreation
Component: Non-roofed accommodation
Cost: $550,000 for 100 sites
Responsibility: - City of Port Alberni
- Chamber of Commerce
- Private Operator

- **Project Description**

The addition of a new campground in Port Alberni will contribute to the cities potential to hold the tourist and consequently generate more revenue.

It is apparent from the high visitation at the Dry Creek Campground, that there is a local demand for campsites - especially on the weekends and during peak fishing.

Continued growth in Port Alberni's sport fishing industry will create additional demand for campsites. No interest has been shown by the private sector because of the difficulty in generating a reasonable return on investment. In order to benefit from the potential spin-offs of overnight visitors as well as supporting Port Alberni's image as a service center, it will be necessary for the municipality to construct a campsite. A number of sites have been considered and it is of the opinion of the consultants that the best location is D.L.14. The site is large enough to support the necessary 100 to 150 campsites to respond to both growth in demand as well as the minumum size necessary to operate a reasonable campground.

D.L.14 also was selected as the favoured location by "Potential Campsite Location Possibilities - City of Port Alberni" report prepared by W.J. Blakely and Associates. The report evaluated four different sites that would accommodate at least a 100-site campsite.

- it is in proximity to Route 4 and the Alberni Mall;
- it respects the long term highway network plan;
- it has excellent tree cover and topographic undulation for campsite privacy; and
- it has low levels of air pollution.

It is also accessible to the Alberni Mall which encourages extended length of stay as well as stimulating spending.

Successful campgrounds do not make their money from the campsites but rather from the ancillary services. Consideration should therefore be given to such on-site, revenue generating features such as:

- small convenience store
- video activities and games area
- mini-golf
- community sponsored suppers
- laundromat.

In an effort to respond to consumer demand as well as maximize Revenue Per Acre (RPA) many operators are now focussing on the Recreational Vehicle (R.V.) market. This allows the operator to charge a higher fee, responded to the fastest growing segment of the camper market and maintain a greater length of stay.

Also, in order to guarantee certain base level occupancies and extend the operation season, many campgrounds have considered timesharing. Under this approach several individuals may own and/or have a pre-arranged right to use a campsite at a specific time. Usually they would pay the municipality in advance for this privilege. Effort would be made to sell this concept in the lower mainland.

● Site Planning Concept

While emphasis should be placed on the R.V. market there is also a tent and tent-trailer market that should be accommodated. These smaller sites usually allow for certain capital cost savings while still generating on-site purchases.

The following approach should be used in a 100 site campground on D.L. 14.

- Full Service	25 sites
- Partial Service (water, electricity)	50 sites
- Minimum Service (water)	25 sites

The campground should also include playground, picnic shelters, play areas for volleyball, open-air cook out pits, etc.

- **Management**

The successful operation of a campground will require experienced and creative management that assures repeat visitation, shoulder season use, and maximum revenue.

Consideration should be given for promoting:
- mini vacation camper packages
- discount off-season pricing
- rental of on-site R.V.'s that could be either purchased or tied-in with local R.V. sales outlets.

- **Marketing**

The sport fishing growth in the region will assume high occupancy levels during the summer, however creative marketing will have to be used to extend the season. D.L.14 should be sold as an in-city campground resort that offers its own on-site program as well as a number of packages encompassing the surrounding region.

- **Cost**

The proposed cost is $550,000 and at $5,500/site, it allows for the construction of playgrounds, picnic shelters, etc. Additional items such as tennis courts or a swimming pool would be additional.

3.4.1.7 Marina Development/Expansion

Theme: Water-based recreation (fishing)
Component: Service
Cost: Contingent on mix of new development and expansion of existing.
Responsibility: - Private Operator

- **Project Description**

Growth in demand for berth space will grow constantly and continuously over the next 10 years stimulated by:

- quality fishing opportunities along Alberni Inlet and Barkley Sound;
- decreasing fish stocks in the Georgia Strait; and
- promotion of Port Alberni as the fishing capital of the World.

Growth can take place through expansion of the existing supply or the development of new facilities (i.e. on I.R. 2 at Polly Point).

The addition of 50 berths at Hunters Marina satisfied present demand, however it is estimated that there will be a need for approximately 200 new berths in the next 10 years in the Area if present growth rates continue.

There will also be a growth need for launching ramps and each new marina should be adequately supplied.

3.4.1.8 Sproat Lake Water Theme Park

Theme: Water-based outdoor recreation
Component: Attraction
Cost: $450,000
Responsibility: - Private Developer
- Regional District of Alberni-Clayoquot

- **Project Description**

A mini themed attraction will be located on Sproat Lake, along Lakeshore Road, south of the West Bay Hotel. It will attract local residents, vacationers at the area campgrounds and provincial parks, day users from Qualicum-Parksville as well as travellers on Route 4 on their way to the coast. It will be a focus to a variety of water-based recreation activities on Sproat Lake including:

- (Sproat Lake Water Ski Assoc.)
- wind surfing competitions/exhibitions, courses, lessons
- regattas

The development will be built around a water slide. Other equipment will include:

- spray area
- recreation pool and waterfalls
- themed playground equipment
- observation area and restaurant
- paddleboat and mini motor boat rentals
- entertainment area

There is a definite land base and parking constraint since there is little space between the road and the lake. However, with appropriate land fill into the lake the low land south of the West Bay Motel could provide the necessary 3-4 acres. This project is not scheduled until the late 1980's at which time the planning process will commence with site identification.

As much as possible the facility should be built over the water.

Water parks are frequently associated with a particular theme such as popular cartoon characters (i.e. Hanna Barbera, Road Runner) or movie sets (Star Wars, science fiction). In order to maintain the integrity of the Destination Area theme it would also seem possible to create character around a thematic forest bush camp.

Action: 1. Select an acceptable site and work with an interested operator on a feasibility study.

3.4.1.9 Mount Arrowsmith Ski Development Upgrading

Theme: Winter outdoor recreation
Component: Local recreation facility
Cost: $200,000
Responsibility: - Mount Arrowsmith Ski Association
- Regional District of Alberni-Clayoquot

- Project Description

Mount Arrowsmith offers the only winter facility with snow-based recreation.

It has however limited potential to attract tourists to the region. Even with the major upgrading progam proposed in the Mount Arrowsmith Ski Development Master Plan it will not likely be competitive with Mount Washington and Forbidden Plateau. A major ski development is therefore a low priority in this tourism strategy.

The existing development may however improve its performance as a regional ski slope, providing an acceptable recreation facility to the local region and in particular, Port Alberni.

Because of its proximity to Port Alberni it nevertheless can play a minor tourism role if considered part of an overall tour package or promoted as an alternative activity at a winter special event (hockey tournament, provincial dog show, etc.).

Action: 1. Continued trail and facility upgrading through the use of available work programs.

3.4.1.10 Della Falls Corridor

Theme: Outdoor recreation
Component: Attraction
Cost: $250,000
Responsibility: - Regional District of Alberni-Clayoquot
- Della Falls Conservation Committee

- Project Description

As the highest water falls in North America, this project represents a major opportunity to:

- gain international recognization for the entire region and the Port Alberni area;
- provide a world class attraction based on the uniqueness of the resource and the outstanding scenic quality of this section of Strathcona Provincial Park; and
- provide both a complementary and alternative hiking facility to the West Coast Trail.

Much of the trail has already been superbly upgraded, however its immediate completion will enable it to be promoted as a major outdoor recreation (hiking, primitive camping, photographing) attraction.

Because of the exclusiveness of this natural attraction it is important to both protect the existing access, via Great Central Lake, as well as ensue that water transportation is always available.

It is proposed that a Della Falls Conservation Committee be established. This organization would be a volunteer organization that would be concerned with the enhancement and protection of the existing access trail's natural and historic (forestry) heritage.

3.4.1.11 Regional Tourism Transportation System (non-scheduled)

Theme: Pacific Rim Recreation Travel
Component: Transportation
Cost: $750,000
Responsibility: - Private bus operator
- Regional District of Alberni-Clayoquot
- Regional Tourism Association
- Receptive tour operator

- Project Description

A well developed, non-scheduled bus service can provide several roles within the regional tourism industry including:

- linking services and attractions
- providing equipment to in-bound tour groups
- serving special events

Typical functions would include:

- moving tour groups between destination resorts and attractions
- linking up with cruise boats to complete a water-land circuit
- developing tie-ins with bus and air operators bringing tour groups to the region
- providing regular service from Port Alberni to the outdoor recreation opportunities in the Port Alberni Destination Area
- transporting day users to Bamfield

The regional system will be located in Port Alberni reinforcing the City's role as a staging area and as a center for tour operations to the region.

Equipment would include both full size buses as well as vans with the rate of acquisition corresponding to rate of growth in the tour package sector.

This system is not intended to compete with the existing scheduled service between Ucluelet, Tofino and Port Alberni but rather to complement it during the summer season.

Due to lack of volume in the winter season these buses could be rented to scheduled operations (e.g. small communities) or winter recreation areas such as Whistler or any interested users.

Coastal Adventures has already started to provide such a non-scheduled service, however in order to respond to the long term growth in package tours, more equipment will be required.

Action: 1. Sub-regional Tourism Assoc. will work with receptive tour operators and local coach operators to assure enough equipment to respond to growth in demand.

3.4.1.12 Ark Resort Upgrading/Great Central Lake/Stamp Falls Unit

Theme: Outdoor recreation
Component: Seasonal accommodation, transportation
Cost: $275,000
Responsibility: Private Operator

- Project Description

The Ark Resort is ideally located to service both Great Central Lake and Della Falls. However, the quality of this facility is below a standard acceptable to the potential national and international tourists that would use this facility enroute to Della Falls/Strathcona Park.

The upgrading as proposed, represents the minimum necessary to:

- upgrade the existing 15 units ($125,000)
- improve the site and marina services ($50,000)
- acquire an additional boat to transport larger groups (10-15) to the Della Falls trail ($100,000).

Promotion of Della Falls as well as fishing and exploration of caves and old mines, will improve shoulder season visitation. Winter facility is limited by the snow conditions, however snowshoeing and cross-country skiing is possible at higher elevations.

3.4.2 Bamfield Destination Area

BARKLEY SOUND UNIT
WEST COAST TRAIL UNIT

3.4.2.1 Bamfield Boardwalk

Theme: Recreation boating
Component: Attraction
Cost: $450,000
Responsibility: - Private operators
- Ministry of Transportation and Highways
- Regional District of Alberni-Clayoquot

- Project Description

An upgraded Boardwalk has the potential to become a tourism focus in the community. It should also be renovated in conjunction with the recycling of existing structures into a small boardwalk cafe/pub[1], the addition of public toilets, a static display on the resources of the Bamfield area, a sea-safety museum display and a craft/souvenier kiosk. Such an attraction would encourage those arriving in Bamfield, by automobile, to cross the inlet and thus strengthen the water-taxi business.

It would also provide a more stimulating activity for those arriving on the Lady Rose II and attract more water traffic from Ucluelet.

As a centre for tourism development in West Bamfield, it would also increase opportunity for vacation home or seasonal accommodation development.

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[1] Based on approval by local citizens

Action: 1. **Implementation will require the initiative of both private enterprise, citizens and government. The collaboration of these three groups can be estblished by firstly focussing on visitor services such as the construction of public washrooms (e.g. Lady Rose, operators, citizens, R.D.A-C.).**

2. **This example of cooperation can then be spread to a full realization of a Boardwalk attraction.**

3.4.2.2 Bamfield Campground - 100 sites

Theme: Pacific Coast camping
Component: Non-roofed accommodation
Cost: $1.1 million to 1.4 million
Responsibility: - Regional District of Alberni Clayoquot
- Ministry of Lands, Parks and Housing
- Private operator.

- Project Description

Site selection and initial site planning have already been carried out for this project.

While funding has not been successfully identified, it is imperative that this project should have a Priority I status in order to alleviate further impacts on Bamfield by campers.

Further campground construction cannot be anticipated by Parks Canada, the Pachena Bay Campground (I.R. 12) or the Seabeam Campground, therefore, this seems to be the only potential development opportunity.

The facility, as presently designed, adequately responds to the potential markets (fishermen, angler families, excursionists, etc.) and ample space has been provided for boat trailers. The addition of playground equipment and a social shelter area would make the facility more attractive to families. Also primitive campsites, for users of the West Coast Trail would be added as a function of demand.

The proposed $1.4 million expenditure may be slightly high. At an average of $14,000/site this is twice the amount which Parks Canada is presently spending on campground development. If, however, costs are reduced to $9,000/site plus $300,000 for road construction, the final cost could be reduced to 1.1 million. As well, it has been acknowledged that if local operators participated in both the construction and operation, costs may be further reduced without affecting product quality.

Action:
1. Significant funds from senior government and the R.D.A-C do not seem to be available.
2. Action by local citizens will then be necessary to implement the facility.
3. Funds for this development will come from make-work programs and foundations, and operate under the direction of the Bamfield Recreation Committee.
4. An initiative has already been shown in the upgrading of the gravel pit. This determination to solve a major problem can eventually spread to the Campground.

3.4.2.3 Boat Cruise/Fishing and Diving Charters

Theme: Pacific Marine environment
Component: Boating service
Cost: $75,000
Responsibility: Private operators

- Project Description

Successful salmon enhancement programmes at Robertson Creek and at Nit-Nat Lake combined with anticipated decrease in sport fishing on Georgia Strait will increase charter demand in Bamfield. Also, it will become known for its proximity of the Deer Group Islands and the Graveyard of the Pacific. Tours/charters to these facilities as well as the scenic, marine interpretation and scenic features of Barkley Sound, the Broken Group, the south coast of Barkley Sound and Cape Beale/Keeha Bay should be offered and promoted.

3.4.2.4 Bamfield Seasonal Accommodation

Theme: Pacific coast retreat
Component: Seasonal accommodation
Cost: $750,000
Responsibility: Private operator

- Project Description

The Bamfield area does not offer a short or intermediate-term opportunity for a year-round destination resort because it:

- does not have an adequate service/attraction mix
- cannot compete with such natural attractions as Long Beach or facilities of Tofino/Ucluelet.

Nevertheless the existing and future fishing potential of the region could support an extended retreat and fishing lodge.

Exceptional fishing and the natural qualities of the area could support a six month 25 to 35 unit operation, either as a grouping of individual units on West Bamfield, or as a more exclusive seasonal retreat at the Cape Beale or Pachena Bay Area.

Although individual seasonal unit costs[1] are low, each proposal would incur relatively high development costs, the latter because material would have to be transported by barge or because of high road access costs. To be successful then, the project would have to anticipate high occupancy rates resulting from creative marketing.

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[1] A recent investigation by MACLAREN PLANSEARCH, for a seasonal accommodation development on Lake Diefenbaker, found that units can be purchased in Vancouver for $9,000 to $10,000.

3.4.2.5 Bamfield Marina

Theme: Water-based recreation
Component: Full marina service
Cost: $125,000
Responsibility: Private operator

- Project Description

A developer has shown interest developing a full service marina, including repairs, gasoline, boat rental, etc., in West Bamfield.

This will be the community's first marina and organized docking facilities for pleasure craft.

However, careful consideration will have to be given to exact location, e.g. because of access to the road system the east side has favourable characteristics.

3.4.2.6 Bamfield Area Trail Improvements and Relocation

Theme: West coast outdoor recreation
Component: Day-use attraction
Cost: $125,000
Responsibility: Ministry of Transportation and Highways

- Project Description

Bamfield's most important attractions are the natural features in and around the community.

Minor trail improvements would make the system more attactive to different market segments. Easements should also be acquired from private property owners.

Trails to Cape Beale, Keeha Bay and Kichha Lake will be upgraded by:

- constructing foot bridges in wet areas
- vista clearing
- adding minimal directional signage

The trails could also be part of combined boat cruise/hiking tours out of Ucluelet and Port Alberni.

3.4.2.7 Alternative Energy Display

Theme: Conserver society
Component: Attraction
Cost: $45,000
Responsibility: B.C. Hydro

- Project Description

B.C. Hydro is studying ways of reducing electricity costs, in Bamfield, created by the use of oil for generating electricity.

Preliminary investigation by engineers at Shawinigan-Lavalin confirm the potential for a combined small hydro/wind power project using the potential hydro power at Kichha Lake and the relatively high local winds.

The concept would include generating electricity from water flowing from the lake and then returning it by wind powered pumps thus creating a continuous reservoir from Kichha Lake.

A static display on alternative energy would be consistent with the conservation theme of Bamfield.

3.4.3 Ucluelet Destination Area

UCLUELET/TOFINO COASTLINE UNIT
BARKLEY SOUND UNIT

3.4.3.1 MacMillan Island Fisheries Exhibit/Ucluelet

Theme: Pacific fishing industry

Component: Attraction

Cost: $650,000 to $900,000 plus land aquisition and display boats

Responsibility:
- Village of Ucluelet
- Fishing Industry (packers, boat operators, etc.)
- Regional District of Alberni-Clayoquot
- Private Operators
- Chamber of Commerce

- Project Description

This project will be the central attraction in the Ucluelet Destination Area and a tribute to the fishing industry on the west coast. It would also be a part of a tourist complex including the Ucluelet Recreation Vehicle Resort Campground, the Canadian Princess attraction/services and the Canadian Princess Resort/ Retail Outlets and the Government Wharf and Docking Facilities.

The land is presently owned by MacMillan-Bloedel and although they have previously offered it to the town of Ucluelet, it is apparent that negotiations will have to be renewed. The land is presently being considered for residential development however its proximity to a collection of tourism related services suggests that the area should continue to have a tourist orientation.

The exhibit components would include:

- parking and pedestrian access
- fishing industry display
- inshore, offshore fishing techniques
- use of fish products
- resource protection techniques
- history of boat construction
- impacts on local, regional, provincial economy.
- sea-safety museum exhibit
- wharf and docking facilities for Lady Rose
- typical period fishing vessels (the present government buy-back program could provide a modern vessel)
- small restaurant-pub and gift shop
- picnic and playground area
- department area for local boat cruises and charters

Action: **This significant attraction presents a major implementation challenge for the citizens of Ucluelet and the region. Steps include:**

1. **formation of MacMillan Island Committee, including Village council, R.D.A-C, Tourism Association, MacMillan Bloedel;**
2. **negotiations with MacMillan Bloedel for land;**
3. **initiate pedestrian connection between Government Wharf and Island via Canadian Princess;**
4. **produce feasibility study and master plan;**
5. **commence fundraising campaign.**

3.4.3.2 Canadian Princess Destination Resort Village

Theme: Pacific West Coast Village
Component: Fixed roof accommodation
Cost: $1.25 million
Responsibility: Private Operator

- Project Description

The existing Canadian Princess property plans to expand its land based facilities to include 36 accommodation units on lands to the north of the parking lot.

This new development will enable the Canadian Princess to provide better accommodation to both its package tours, and overnight visitors as well as allowing the Canadian Princess boat to be used for more activities and programs - thus reinforcing its role as an attraction.

The project will be designed with a distinctive west coast architectural motif and will include destination resort amenities including both games areas and retail outlets.

The project is important to the Ucluelet Destination Area because it:

- provides Ucluelet with an upscale destination resort;
- reinforces this strong tourism node including:
  - the MacMillan Island Fisheries Exhibit;
  - Government Wharf/Marina; and
  - Recreation Vehicle Resort Campground.

3.4.3.3 Ucluelet/Pacific Rim Recreation Vehicle Resort Campground

Theme: Pacific Coast Recreation Vehicle Accommodation
Component: Non-roofed accommodation
Cost: $325,000
Responsibility: Private operator

- Project Description

A Recreation Vehicle Resort Campground is an important accommodation component to the Canadian Princess Resort/MacMillan Island Fisheries Exhibit Tourism Complex. The R.V. market is different from the traditional campground users because they are drawn to the recreation facilities and tourist services more than the natural attractions. Ucluelet has the mix of retail services to appeal to this market and the proposed site location between the Canadian Princess and the Trans Pacific Fishing Company provide excellent access to the proposed attractions and entertainment of MacMillan Island and the Canadian Princess.

The development is to include:

- 65 campsites, fully landscaped
- covered social area with adult games (shuffleboard, etc.)
- 3 to 5 fully equipped comfort stations

3.4.3.4 Davison Plaza Upgrading

Theme: Pacific Rim Fishing Community
Component: Retail services
Cost: $150,000 - $200,000
Responsibility: Private operator(s)

- Project Description

The Fisheries Exhibit and accommodation sector would draw visitors to Ucluelet, and an attractive retail complex would serve the travellers shopping needs. Davison Plaza has the scale and potential retail mix to serve the tourists however, it would be more appealing if given a complete facelift and site redevelopment.

Renovations and upgrading would include:

- overall facelift for all storefronts through the use of wood, coordinated signage, rain protectors, etc.
- providing landscape treatment
- organized parking stalls
- public exhibition/entertainment space
- banners, street furniture, playground equipment

Two development nodes would be established in Ucluelet, the MacMillan Island Fisheries Exhibit and the Davison Plaza, linked by Peninsula Avenue.

3.4.3.5 Peninsula Avenue Streetscape

Theme: Fishing Village Commercial Street
Component: Retail services
Cost: $250,000 to $400,000
Responsibility: - Village of Ucluelet
- Chamber of Commerce
- Peninsula Avenue Merchants Association

- Project Description

Peninsula Avenue will be used to link the MacMillan Island/ Canadian Princess Complex Node with the Davison Plaza Node. As such it will be constantly used by pedestrians moving in both directions or by those staying at the various motels along the strip.

The street also has a number of attractive retail outlets which encourage browsing and shopping.

Streetscaping should initially be applied to the stretch between the two complexes and then extended to the Ucluelet Hotel.

Upgrading should include - sidewalk reconstruction, storefront improvements, street furniture, treeplanting, rest areas and information/promotion signage.

3.4.4 TOFINO DESTINATION AREA

UCLUELET/TOFINO COASTLINE UNIT
BARKLEY SOUND UNIT

3.4.4.1 Fisherman's Village Complex

Theme: Pacific West Coast Community

Component: Retail attraction

Cost: 1.6 million (not including property acquisition)

Responsibility:
- District Municipality of Tofino
- Regional District of Alberni-Clayoquot
- Individual Private Operators

- Project Description

A small Fisherman's Village Complex, with a strategic waterfront location, on Browning Passage, would serve as a center for tourists at the Tofino end of the Ucluelet/Tofino Coastline Unit. Most of it would be built over the water and create the image of a traditional collection of buildings along a fishing wharf.

The individual components would include:

- 4 retail outlets (gifts, craft, supplies)
- small restaurant/pub and fast food outlet
- fish market
- marina (40-50 berths) and floating dock
- sea-safety exhibit
- display/information area
- public space for salmon barbeques, entertainment, flea markets, informal eating, gathering and observation of fishing activities in Passage
- departure for boat cruises to Clayoquot Sound, Meares Island, Hot Springs Cove, etc.
- lodging
- parking lot and access

An exact location has not been identified as a number of options are apparently available including the acquisition of existing fish processing installations.

As a major attraction for this Destination Area, it will require the combined efforts of several government departments, private investment capital and the energy of the residents of Tofino.

Action: This project presents an important challenge to Tofino, its' private sector, and its' residents. Implementation steps include:

1. **Negotiations between Tofino and interested private operators (2 have been identified).**
2. **Preparation of feasibility study.**
3. **Negotiations with various private operators.**
4. **Appeal to government for support funding.**

3.4.4.2 Underwater Marine Exhibit

Theme: Pacific marine education
Component: Attraction
Cost: $750,000
Responsibility: - Private attraction operator
- Regional District of Alberni-Clayoquot

- Project Description

Underwater exhibits have already been proposed in Canada, yet to date none have been constructed. In fact, no major underwater exhibit exists in North America yet they are found in several locations along the Japanese coast.

The technology has been well developed over the past decade and costs for a medium size silo range from $500,000 to $800,000, according to Parks Canada engineers who have undertaken recent feasibility studies in Eastern Canada.

The coastal waters of Alberni-Clayoquot offer some of the best marine observation/interpretation opportunities in the world.

The Browning Passage with its constantly moving, clear waters provide an ideal setting for such a facility. As well, the location provides proximity to the services of Tofino, contributing to its role as a Destination Area.

The facility would include:

- silo-type submerged observation tower;
- pedestrian access bridge;
- on-shore facilties including gift shop, static display and parking area; and
- appropriate " seascaping" of the ocean floor immediately adjacent to the observation area including sunken ships, captive fish species, netting and lighting.

As the first of this type of facility in Canada, it is certain to be a major national and international attraction creating invaluable publicity for Vancouver Island and the Pacific Rim Destination Region and therefore should attract investor and private sector capital. See Appendix II for example of typical silo-type.

3.4.4.3 Native Destination Cultural Resort and Museum

Theme: Pacific coast native culture
Component: Attraction
Cost: $650,000 - $1.5 million
Responsibility: - Clayoquot Band Council
- Nuu-Chah-Nulth Tribal Council

- Project Description

The construction of a Native Cultural museum representing the heritage of the local 13 Bands is the top tourism priority of the Nuu-Chah-Nulth Tribal Council. Two sites have been proposed - Tin-Wis in Tofino, and I.R. #6 in Ucluelet.

The consultants suport the museum in conjunction with the development of a cultural destination resort at Tin-Wis.

The cultural center/museum will be constructed adjacent to Residence and include:

- Nootka Ceremonial House
- museum display area
- area for native craft/culture instruction courses
- craftshop
- small theatre

3.4.4.4 Cox Bay Destination Resort - Campground Upgrading

Theme: Pacific coast beach experience
Component: Destination resort accommodation
Cost: $2.5 million
Responsibility: Private operator

- Project Description

The site of the existing Pacific Rim Resort Campground has the necessary natural resources to support a quality destination resort of approximately 75 units.

The existing 500 campsites must be upgraded in order to offer quality camping services and maintain its status as the major campground facility in the region.

The overall resort complex would include:

- 75-100 unit resort hotel and restaurant
- conference/small seminar facilities
- 500-600 campsites
- hiking and horseback trails

3.4.4.5 Destination Resort-Chesterman/MacKenzie Beach, Cox Bay

Theme: Pacific coast accommodation experience
Component: Destination resort accommodation (fixed roof)
Cost: $2.5 million
Responsibility: Private operator

- Project Description

Due to the relatively strong financial position of the existing beach destination resorts, it is estimated that the Tofino Area will eventually support a second destination resort at either Chestermans Beach, MacKenzie Beach or Cox Bay. This may take place as either expansion of an existing facility, such as Pacific Sands, the development of a new facilty or a combination of both.

Market conditions suggest the potential for a 75 to 100 unit development.

The development should be of a similar quality to the proposal at Cox Bay and include a restaurant, sauna/pool, tennis etc.

It should also be capable of catering to small conventions and seminars.

The eventual development of a Native Cultural Resort would create a unique attraction/accommodation facility for the region. Cultural/educational programs would be offered to visitors who would also be exposed to native craftsmen and entertainers. The combination of a beachfront property and native cultural experience offers many opportunities for extended stay and the long term goal would be a year-round facility.

3.4.4.6 Tin-Wis Cultural Destination Resort

Theme: Pacific coast/native culture
Component: Seasonal accommodation
Cost: $1.65 million (Phase I)
$2.5 million (Phase II)
Responsibilty: Clayoquot Band Council

- Project Description

The immediate renovation of the Christie Residence into a seasonal accommodation facility enables:

- the region to respond to a fast growing low-end, budget market
- the property to generate a profit on a 5-6 month operation thus enabling the units to be used for native cultural purposes during the winter season
- the Clayoquot Band to be gradually introduced to the techniques of motel/hotel management.

Discussions with the Clayoquot Band Council indicate that the facility should eventually be developed into a high quality cultural destination resort.

Action:
1. **Secure Native Cultural Center/Museum**
2. **Establish a development committee including members from Clayoquot Band Council, Nuu-Chah-Nulth Tribal Council, Indian Affairs, Tofino Council.**
3. **Prepare Feasibility Study and Master Plan.**
4. **Negotiate with Special ARDA, NEDP, etc., to secure funding.**

3.4.4.7 Meares Island Interpretation Tour and Exhibit

Theme: Pacific coast environment
Component: Attraction
Cost: $100,000 to $125,000
Responsibility: - Friends of Clayoquot Sound;
- Meares Island Planning Committee;

- District Municipality of Tofino; and
- MacMillan Bloedel.

- Project Description

Two groups, the Friends of Clayoquot Sound and the Meares Island Planning Committee should renew their mandate from one of planning to "heritage resource development". Like the Della Falls Conservation Committee they would be responsible for soliciting capital funds to develop those natural and historic features that may be preserved before they are affected by the proposed forestry operations.

Possible developments would include:
- Fort Defiance Historic Site
- various native heritage sites
- nature interpretation sites and trails

Development will consist of docking facilities, self-guided trails, static displays, picnic areas and primitive campsites.

3.4.4.8 Pacific Rim Golf Course

Theme: Recreation
Component: Attraction
Cost: $500,000
Responsibility: Long Beach Recreation Cooperative

- Project Description

Clearing and construction of a 18-hole golf course began in 1982. Approximately $500,000 is required to complete the project to a quality that will make it appealing to visitors to the Ucluelet and Tofino Destination Areas.

In particular, it will be an important part of the attraction package to the destination resorts. Conference and small seminar groups, incentive tours and certain specialty groups place a high priority for a golf course. This facility should respond to the demands in the Ucluelet/Tofino Coastline Unit.

3.4.4.9 Pacific Rim National Park Campground Expansion

Theme: Pacific Coast Environment
Component: Non-roofed accommodation (400 units)
Cost: $2.8 million
Responsibility: Parks Canada

- Project Description

The Pacific Rim National Park Campgrounds are the most popular in the region because of their quality, reputation and access to the natural resources of the park.

The park is therefore not only the most significant tourist attraction in the region but also a major supplier of travel services. This latter role should be expanded by developing an additional 400 campsites in the park.

There is, however, a written agreement between Parks Canada and the private campground operators stating that the federal government will not become futher involved in campground development - this agreement should be renegotiated allowing Parks Canada to fully participate in the tourism industry. Although the agreement was intended to protect the private campground owners, their financial performance and product quality has not met the initial intentions of this agreement.

The issue is unquestionably complex and to date has proven detrimental to the tourism industry in the region.

The present acquisition of Pacific Rim Resorts should be closely monitored to see if the new owners respond to the demand in terms of a quality of camping experience in keeping with the uniqueness of the region.

If history repeats itself and the region remains undersupplied with quality campsites, then the agreement should be reconsidered to protect the long term integrity of the region.

The pros of Parks Canada involvement as a campground are of course a healthier camping environment resulting in overall increased visitation and length of stay.

When realistically considering present interest rates, lack of tenders, construction and land costs, the consultants cannot foresee the private sector successfully responding to the camper demand.

3.4.5 Regional Services

3.4.5.1 Regional Tourism Information Centre

Theme: Pacific Rim Tourism Information
Component: Information Services
Cost: Phase I - renovation $45,000 plus $30,000 (Ucluelet, Tofino, Bamfield)
Phase II - construction $400,000
Responsibility: - A-C Regional Tourism Association

- Project Description

The development of a Regional Tourism Information Centre will take place in two phases:

- Phase I - the renovation of the existing Port Alberni facility to include a regional information service.
- Phase II - construction of new major Information Centre at the entrance to the region.

The new facility will be equipped with:

- a reservation service
- a video display of attractions and services
- four separate rooms highlighting the resources of each of the destination areas
- site development reflects the quality of West Coast landscape experience to be found in the region.

It is possible the inbound (west lane) should be diverted to pass "through" the regional information complex.

3.4.5.2 Regional Signage

Theme: Pacific Rim Tourist Information
Component: Information/transportation services
Cost: $175,000
Responsibility: - Sub-regional Tourism Association
- Regional District of Alberni-Clayoquot

- **Project Description**

The sign program has been outlined in section 3.3.8.2 - Development Programs - Transportation (Signage).

3.4.5.3 Boat Cruises/Fishing-Diving Charters

Theme: Pacific Rim Marine
Component: Attraction
Cost: $500,000
Responsibility: Private Operators

- **Project Description**

There are 17 cruise operations in the region providing a variety of boating experiences. Approximately half are year-round and the quality of equipment varies. There are presently enough operators (except during the peak whale watching season) to serve the existing market and an immediate increase in visitor use would not require additional year-round boats.

If the whale watching phenomena continues to increase in popularity an additional vessel may be considered for the intermediate term.

The number of sport fishing charter vessels does not need to increase at the present time, however, there is a need for an increase in promotion of the vessels, and the fishing charter industry. The first step has been taken by the operators in Port Alberni by forming the Alberni Salmon Charters Association. Money should be made available to this group and any other similar groups to promote fishing charters and to provide the tourist with information on where to find the vessels and who is available to charter. Guidelines should be prepared to ensure that the charter vessels maintain a specific level of quality.

Although exact vessel demand is difficult to predict with the proposed market expansion, the following new vessels should be required in each of the following locations:

Port Alberni
- Alberni Inlet - short cruise
- Barkley Sound - cruise/fishing
- Broken/Deer Group Islands - cruise
- 3 vessels

Ucluelet
- Barkley Sound/Broken Group
- Fishing/cruise

Tofino
- Clayoquot Sound - fishing/cruise
- 2 vessels

Bamfield
- Barkley Sound - fishing/cruise
- 1 vessel

3.4.5.4 Toquart Bay Regional Campground

Theme: Outdoor recreation
Component: non-roofed accommodation
Cost: $175,000
Responsibility: Ministry of Forests

- Project Description

The unstructured camping at Toquart Bay should eventually be organized into a defined camping area. The location has been experiencing increased growth and the beach area has now become a parking lot for vehicles and trailers.

Camping should be back off the beach allowing for pedestrian and boat access only.

Development will include:

- campsite layout and design
- comfort stations
- minimal camper services (e.g. water, fire pit, etc.)
- relocation of boat ramp.

3.4.6 Preliminary Project Feasibility Analysis

3.4.6.1 Introduction

Nature, which provides the main attractions of the region, offers very broad appeal. Almost everyone could enjoy visiting the area - whether young or old, whether looking for active recreation or quiet contemplation, whether roughing it or staying in secure comfort. The potential therefore exists to attract many more visitors. It depends on the region itself - how it will organize itself to develop, promote and support tourism while protecting its natural heritage.

It is up to the people who live there to decide whether or not to expand tourism, and if they want tourism to grow, to decide how it should grow. However, the opportunities and choices are not the same for each community. The realities of size, population, access, natural features, local history and local attitudes limit the range of compatible choices within particular communities. Thus, although the region can offer something for everyone, some community specialization is called for in any plan for growth.

The main focus of the region, its raison d'etre as a tourist destination, is clearly Pacific Rim National Park. It is the outstanding attraction in the area. The Park itself offers ideal accommodation for campers, beautiful beaches and excellent trails and outdoor interpretation; and expansion is underway for outstanding indoor interpretive facilities. The Park has broad appeal - to families, day users, campers, and to persons interested in natural history and the passive or active enjoyment of nature.

This leaves many opportunities for the communities and the private sector to reinforce this experience and to offer facilities and activities that are not part of the Park's mandate.

Existing tourist markets and new tourism patterns point to opportunities available to the region. These include:

- The increasing trend to close-to-home travel. This favours the region because of its proximity to the large population on the lower Mainland, thus offering a nearly full spectrum of market demand.

- The growing popularity of packages - whether comprehensive packages that include transportation, accommodation, meals, activities, etc., or smaller packages that include only two or more key components. The main strength in this field is in (a) adventure and (b) special interest packages. The region can readily offer both. It can also offer simple packages which reduce cost uncertainties and which preplan activities. Depending on the packages, these can appeal to seniors, fishermen and families.

- There are a million or so visitors to Vancouver Island who do not come to the region. What a market opportunity! These persons can become day visitors as well as guests for overnight and extended stays.

  It is a matter of marketing - for example, tieing in with tours to Victoria, providing transportation and special packages to serve the growing market of seniors and empty nesters, etc. It is also a matter of management - co-ordination, restaurants, the right accommodation, programming, rainy day activities, etc.

- Although family travel is declining in importance, the closeness of the large market on the Lower Mainland offers ample opportunities for the region.

- Culture and the arts (painting, sculpture, crafts, performing arts, history, museums) are increasing in importance to a broad range of tourists, not only those who are above average in education and income. For the region to compete with other tourist areas, it is necessary to develop a strong base in this field.

- Short visits are more popular, especially on weekends. Packages can be created to promote both weekends and weekdays.

- It is a safe assumption that all market segments have become more determined to receive value for their money. All marketing efforts need to be built on good value, and not rely on flashy promotion. Two key factors for success depend on the value issue - word-of-mouth promotion, and return visits. One element in value for money is a fair rate of exchange; the exchange rate is not the place to make money, but it can be the means of gaining or losing goodwill for the operator and for the region.

- Business meetings are a good market that is scarcely being tapped by the region, and it is available in the shoulder and off-seasons.

This section sets out preliminary financial projections and comments related to some of the recommended development components. These projections are not to be regarded as feasibility analyses for use by potential developers, investors and lenders. It would be the practice of such parties to rely on their own detailed studies prepared on the basis of factors specific to a prospective investment - for example, site, size and style of facilities, management and marketing strategies, debt and equity structure, interest rates, other new and proposed developments that would be complementary or competitive, current cost factors, etc. Some entrepreneurs may attach relatively more importance to life style benefits and less importance to earnings potential.

The purpose of the following projections is only to give some sense of order of magnitude. Furthermore it should be noted that all of these projections are subject to the inherent uncertainty of the future; we therefore do not guarantee them or accept any financial responsibility for their accuracy.

3.4.6.2 Financial Projections

The following projections should be read together with the assumptions and comments which are listed below and which are made in relation to specific items of revenues and expenses:

- It is assumed that all of the recommendations made in this report for improving the organization, infrastructure and marketing of the region would be implemented and in place.
- It is not practical to assume the sequence in which development opportunity would be implemented. Nevertheless one development's operating results would be dependent on the existence of other developments - for example, attractions would benefit from increased accommodation capacity. Thus these projections, as stated above, should be regarded with this limitation in mind.
- All financial information and projections are presented in 1984 dollars; thus we have not included an inflation factor in our estimates.
- The projections do not provide for depreciation of fixed assets.
- The projections do not provide for income taxes.
- We have not made any assumptions related to equity and debt structures. As a result the projections do not provide for debt service requirements.

3.4.6.3 Fisherman's Village - Tofino

The following is related to four business components of the proposed complex:

(a) small restaurant
(b) fish market
(c) souvenir/craft outlet(s)
(d) marina

(a) Small Restaurant

- Assumptions and comments:
  - includes snack bar
  - no alcoholic beverages

  - The Fisherman's Village would be visited by about three quarters of the visitors to Tofino in the June to September period. This takes into account that Tofino is a destination point, and that while some persons would not visit Fisherman's Village, others would visit more than once.

  - The average expenditure per customer is assumed to be $4.00.

- Preliminary financial projection:

Estimated Revenue:		$ 80,000
Estimated Expenses:		
Cost of Sales (45%)	$ 36,000	
Operating (40%)	32,000	
		68,000
Estimated Net Operating Profit		$ 12,000

(b) Fish Market

- Assumptions and comments:
  - About one in twenty visitors to Fisherman's Village would purchase sea food. Average purchase amount is estimated to be $10.

  - Period of operation: May to October.

  - Two or three separate stalls or waterside locations would be operated by independent fishermen or merchants.

  - The following projections are for the total of two or three stalls.

- Preliminary financial projection:

Estimated Revenue	$ 52,000	
Estimated Expenses	20,000	
Estimated Net Operating Profit		$ 32,000

(c) Souvenir/Craft Outlet(s)

- Assumptions and comments:

  - About one in six visitors to Fisherman's Village would make a craft or souvenir purchase at the Village. Average purchase is assumed to be for $3.50.

  - Period of operation: May to October.

- Preliminary financial projection:

Estimated Revenue	$ 60,000	
Estimated Expenses		
Cost of Sales (40%)	$ 24,000	
Operating (33%)	20,000	
		$ 44,000

Estimated Net Operating Profit $ 16,000

(d) Marina

- Assumptions and comments:

  - 35 slips: 20 resident, 15 transient
  - Period of operations: year round
  - Slip rentals: resident 50%; $750 - summer; $500 - winter transient 25%; $0.50 per foot per night

- Preliminary financial projections:

Estimated Revenues:		
- Slip Rentals	$ 24,000	
- Mechanic Charges	25,000	
- Hoist Fees, Pumping Out	3,000	
- Supplies	20,000	
- Other	4,000	
		$ 75,000
Estimated Expenses:		
- Cost of Sales	$ 12,000	
- Wages	27,000	
- Operating (40%)	30,000	
		$ 69,000
Estimated Net Operating Profit		$ 6,000

3.4.6.4 Crafts Festival - Tofino

- **Assumptions and comments:**

  - To take place in Tofino for four days in peak or shoulder season.

  - 60 exhibitors paying an average rental of $15 per exhibitor.

- **Preliminary financial projection:**

Estimated Revenues:		
- Table Rentals	$ 900	
- Program Advertising (net)	1,000	
- Food Concessions	100	
		$ 2,000
Estimated Expenses:		
- Marketing	$ 1,500	
- Operating	500	
		$ 2,000
Estimated Net Operating Profit/Loss		--

3.4.6.5 Resort - Tofino

- **Assumptions and comments:**

  - 60 units - high quality with food and beverage and meeting room facilities.

- Period of operation: year round; average occupancy 70%

- Average rate per occupied room: $60

- Preliminary financial projection:

Estimated Revenues:

- Rooms	$900,000	
- Food and Beverage	500,000	
		$1,400,000

Estimated Expenses:

- Rooms	$225,000	
- Food and Beverage	400,000	
- Operating	275,000	
		$ 900,000

Estimated Net Operating Profit		$ 500,000

3.4.6.6 Christie Residence - Tofino

- Assumptions and comments:

  - Period of operation: May to October
  - 70% room occupancy
  - 1.75 persons per room at $9 per person per night
  - breakfast service

- Preliminary financial projection:

Estimated Revenues:

- Rooms	$100,000

- Food	20,000	
- Sundry	5,000	
		$125,000

Estimated Expenses:		
- Rooms Department	$ 20,000	
- Food Department	16,000	
- Operating	25,000	
		$ 61,000

Estimated Net Operating Profit	$ 64,000

3.4.6.7 MacMillan Island Ocean Fisheries Exhibit - Ucluelet

- Assumptions and comments:

  - Operating period: May to October
  - Average length of stay at exhibit: at least one hour
  - Assumed attendance: 8,000 - 10,000 persons
  - Ticket prices: $1.00 - adult; $0.50 - children

- Preliminary financial projection:

Estimated Revenues:		
- Attendance	$ 8,000	
- Gift Shop	1,000	
- Donations	1,000	
		$ 10,000

Estimated Expenses:		
- Salaries and Wages	$ 30,000	
- Operating	20,000	
		$ 50,000

Estimated Net Operating Deficit Before Grants $ 40,000

3.4.6.8 Regional Theatre Company - Port Alberni

- Assumptions and comments:

  - 40 performances in Port Alberni; 10 person cast

  - Reliance has been placed, in part, on a projected budget provided by the Port Alberni Theatrical Society.

- Preliminary financial projection:

Estimated Revenues:

- Ticket Sales	$ 40,000	
- Fund Raising	5,000	
		$ 45,000

Estimated Expenses:

- Cast and Technicians	$ 75,000	
- Rentals	10,000	
- Costumes, Scenary	5,000	
- Operating	5,000	
		$ 95,000

Estimated Net Operating Deficit Before Grants $50,000

3.4.6.9 Cruise Boat - Lady Rose II - Port Alberni

- Assumptions and comments:

  - Operating period: June to September

- Passengers: 5,000
- Average fare: $30
- The impact of the Lady Rose II on the passenger volume of Lady Rose I, with which it would be in competition, has not been taken into account.

- Preliminary financial projection:

Estimated Revenues (Ticket Sales)		$150,000
Estimated Expenses:		
- Salaries and wages	$ 75,000	
- Operating	50,000	
		$125,000
Estimated Net Operating Profit		$ 25,000

3.4.6.10 Campground - Port Alberni (D.L.14)

- Assumptions and comments:
  - 50 sites (Phase I only)
  - Operating period: June to September
  - $8 per campsite per night
  - average occupancy for the four operating months - 63%

- Preliminary financial projection:

Estimated Revenues (campsite rentals)		$ 31,000
Estimated Expenses:		
- Wages	$ 38,000	
- Operating	10,000	
		$ 48,000
Estimated Net Operating Deficit		$ 17,000

3.4.6.11 Campground - Bamfield

- **Assumptions and comments:**
  - Based on first phase of 50 sites
  - Operating period: June to September
  - $8 per campsite per night
  - 65% occupancy

- **Preliminary financial projection:**

Estimated Revenues		$ 32,000
Estimated Expenses:		
- Wages	$ 50,000	
- Operating	20,000	
		70,000
Estimated Net Operating Deficit		$ 38,000

3.5 TOURISM ORGANIZATION

A successful Tourism Destination Region is one that is well organized and under the direction of a capable and motivated Regional Tourism Association. Our interviews with private operators, associations, politicians and regional government employees indicated that the necessary level of enthusiasm and knowledge to establish a dynamic Pacific Rim Tourism Association does exist. By providing their various skills and resources these groups or individuals can establish a vital organization capable of promoting tourism and responding to tourism related issues throughout the region.

The association will require strong leadership and a level of communication that enables each member to interact for the good of the region. The result will be an association that is:

- a strong voice for tourism in the region;
- a facilitator for tourism development; and
- an instigator of inter-community cooperation and collaboration

The proposed association will be incorporated and non profit and have the following characteristics.

3.5.1 Objectives

- to regroup all individuals, corporations, municipal and public agencies, associations, and organizations and businesses dealing with tourism in the Regional District of Alberni-Clayoquot;

- orient and support the promotion, the development and the programming of tourism in the best interest of the citizens of the region;

- represent the region to the various levels of government and to other industries in all areas that concern tourism;

- promote, organize and coordinate the various tourism developments and promotion activities that both attract tourists, as well as increase their overnight stay in the Tourism Destination Region; and

- obtain, for the Tourism Destination Region, government support (grants, investments, programs, etc.) that promotes tourism developments.

3.5.2 Members

The following should be approached for membership in the association:

- all incorporated municipalities;

- all establishments (hotels, motels, restaurants, campgrounds service stations, charter boat operators, etc.);

- all associations, corporations, institutions; and

- all persons interested in special events and attractions, commerce and industry.

3.5.3 Roles and Responsibilities

- to organize an office that allows members to obtain the services that respond to their needs;

- to ensure quality reception services for the visitor;

- to develop and improve services and facilities in each of the Destination Areas;

- to develop a promotional policy based on the available tourism attractions;

- to support the implementation of the Alberni-Clayoquot Regional Tourism Development Strategy;

- to develop a policy of standardized information and grouping of services;

- to institute a better collaboration between the private sector and local governments; and

- to exercise real facility control over tourism development in the region by examining the various plans and projects as they relate to the objectives of the association.

3.5.4 Financing

Financing for the first year must be totally in the form of grants. Cost sharing amongst local governments and bodies as well as federal and provincial governments should generate the necessary funds including:

- $65,000, salary and administration
- $70,000, promotion

In the second year, financing will be based on a grant as well as a membership fee. During the first year, the Association will develop a membership fee policy based on the following categories:

- Profit-oriented business (hotels, motels, bars, restaurants, tourist attractions, etc.). Typical charge (e.g. $10/room, $5/table);

- non-profit organization: craft festivals, outdoor areas, museums, etc.;

- local organizations such as Band Council's, Chambers of Commerce, Merchants Association, etc.; and

- financial institutions, interested companies, or any other grouping as determined by the Board of Directors.

3.5.5 Board of Directors

The Board of Directors will consist of 19 members. Five members will be selected from each of the primary destination areas and four from the secondary destination area.

The five members from each section will represent the following categories:

Primary Destination Area (3)

1. Accommodation and food services
2. A profit-based business related to tourism
3. Non-profit organization
4. Chamber of Commerce
5. Municipal council.

Secondary Destination Area (1)

1. Accommodation and food services
2. A profit based business
3. Non-profit organization
4. RDA-C representative

Five non-voting, ex-officio members will be represented from:

- Regional District of Alberni-Clayoquot
- Economic Development Commission
- Ministry of Industry and Small Business Development
- Tourism B.C.
- Tourism Canada

The Executive of the Board will consists of a:

- President
- Vice President - promotion
- Vice President - development
- Treasurer
- Executive Director

3.5.6 Staff

- permanent staff

A executive director would be hired to direct the daily operations of the association. This person would be responsible for responding to the requests of the regional tourism industry as well as instigating the various development programs and opportunities outlined in the Regional Strategy.

- part-time staff

A part time secretary would be required. This person may initially come from within the staff of the Regional District or Economic Development Commission.

Community hosts could eventually be hired in each destination area. They would be responsible for assuring a quality product in each community, assisting communities in organization and serving as a host for tour groups, familiarization tours, etc.

3.5.7 Structure

The Sub-Regional Tourism Association may be formed by either the Regional District of Alberni-Clayoquot or the Economic Development Commission.

Both agencies have the necessary enthusiasm, concerns and mandate to set up the initial meetings to organize the formation of the Regional Tourism Association.

They also have the necessary space and administrative facilities to serve as a location for the tourism association services.

4. SOCIO-ECONOMIC IMPACT

4.1 ECONOMIC IMPACT

There are several dimensions to the impacts of tourism development on communities and destination areas within the region - each one being important to the development of the overall region.

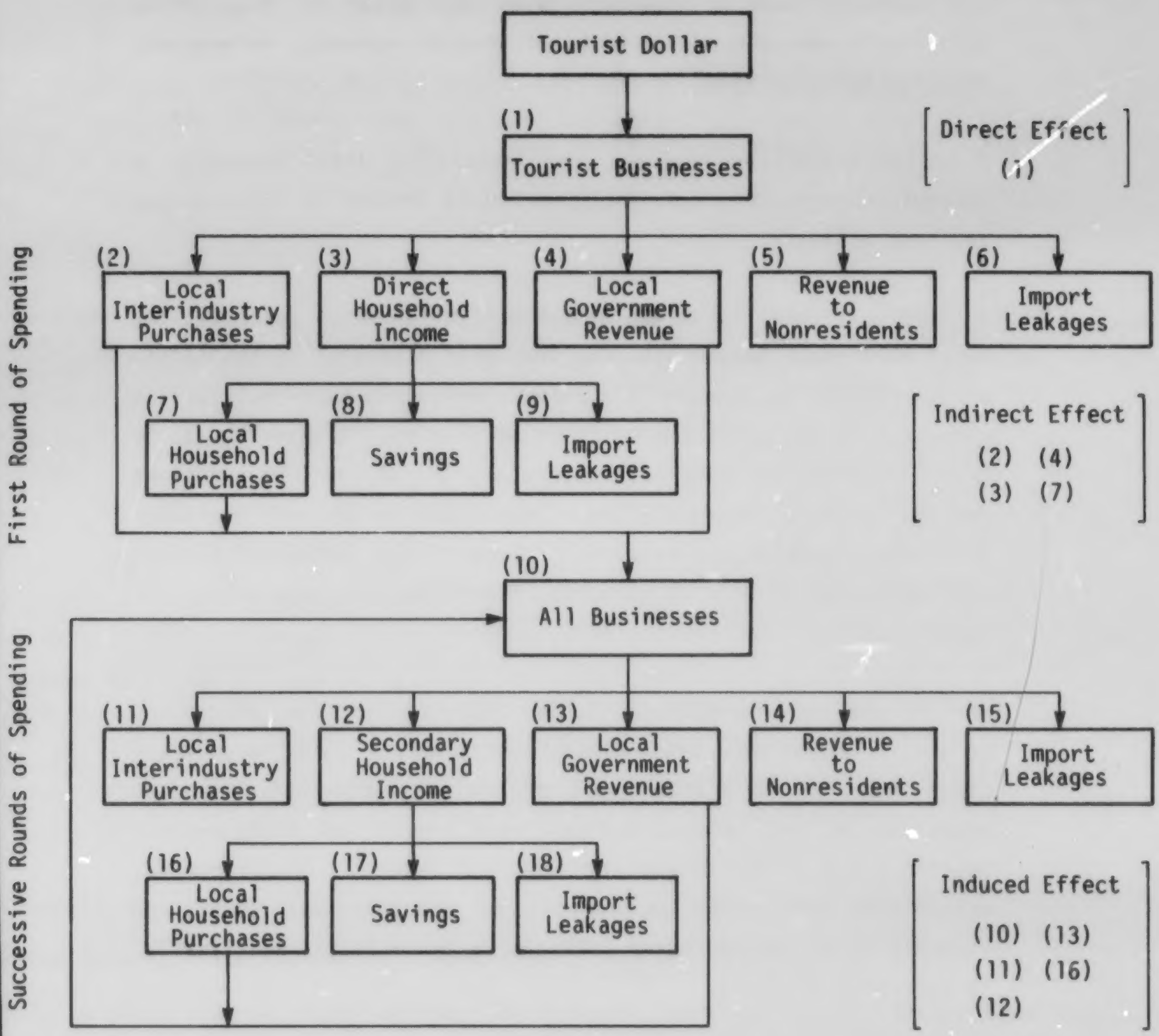
Firstly, tourism investments creates a product or a service which has value to people using the facility or area. If the recreational opportunity or attraction, for example, Pacific Rim National Park, meets a certain demand, then people indicate it by their willingness to give up alternatives (that they could obtain for similar expenditures of time and money), in order to enjoy the benefits of the experience. This is an expression of real economic value whether or not the recreation services are directly priced, that is, whether or not users priced and paid for the direct beneficiaries of the service or output of the investment. But this non-market nature of the use where money is not actually exchanged, does not make the economic value less real. This value or benefit is called "user values" and is measured by, the willingness to pay. Demand for recreational and tourist facilities should also be viewed from this point - that is, welfare gain accruing to visitors.

The second kind of (tourism) economic impact is that associated with actual expenditures by visitors or tourists. These are, outlays for such things as meals and food, lodging, gasoline and other travel expenditures such as equipment purchase and rental and supplies. The expenditures made for local goods fall into a fairly consistent and narrow pattern. But even among these few categories, the impacts vary, as many researches have proven - substantially, not only because of differences in totals, but in their requirements for local and non-local labour and material.

This is especially true if one looks at Port Alberni, Tofino, Ucluelet, and Bamfield, separately, or as a region.

The initial expenditures of visitors in a region provide the direct or first round of receipts to that region's economy. These dollar flows, however, do not represent direct incomes to local residents. Depending on the kind of commodity or service purchased, more or less of each dollar must in turn be paid out for the stocks or materials used or sold, and some may accrue as profits and other payments to non-residents. Thus, much of the initial revenue flow leaks from the region. The extent to which this occurs will depend on the size and nature of the local economy, and in particular the extent to which supplies to local businesses come from other enterprises and individuals within the same area. Generally, smaller and more rural regions would be expected to experience greater leakage to outside suppliers. For example, the study region is expected to have higher leakages than Vancouver Island, as a whole, or the Victoria region. Some of the original receipts however, will remain in the region to be paid to local suppliers as well as to local individuals in the form of salaries and profits. As a result, local output is increased, calling for further labour and additional supplies. Again, the extent of these indirect impacts of the initial revenues will vary with the nature of the expenditures and the local economy.

As wages, salaries, profits and other local income payments increase, as a result of visitor spending, local consumption will increase as these increased incomes are at least in part spent locally. This will induce still further local income, depending on local conditions the propensity of residents to spend money for locally supplied goods and services. These direct and indirect effects are often summarized in so-called multiplier effects. Figure 4-1 shows in detail the nature of these effects in successive rounds of spending.



Adapted from J. Lui "The Economic Impact of Tourism on an Island Economy".

Figure 4-1

Flow of the tourist dollar in the local economy.

One commonly used multiplier (sales multiplier or transaction multiplier) measures the effects of visitor spending on economic activity or total sales in the area.

A second multiplier measures the impacts of these revenues on incomes to residents of the area as a result of direct and indirect activity.

A third multiplier is an employment multiplier which describes the total employment impact stemming from that generated by the initial spending. A summary of income and employment multipliers conducted by using an input-output methodology is given in Table 4-1. It indicates that multipliers are calculated for overnight and day trippers separately and their magnitude changes considerably from location to location. However, two Canadian studies, both conducted in British Columbia, reveal fairly close values for income and employment multipliers.

One of the more pertinant studies covers Victoria, which has several similarities with Alberni-Clayoquot. This resemblence stems from the fact that types of tourists and their spending behaviour do not show a dramatic difference, as explained in Section 9.4.8 of the Background Technical Report. Person per day expenditure (in 1979) in Tofino and Ucluelet was $9.56, in Victoria $9.55, in Vancouver Island as a whole $9.13, and finally, in Port Alberni $7.80.

Since the study area does not have a regional input-output table reflecting the inter-industry flows, the multipliers for tourist spendings can not be computed with precision as in the cases of Victoria and Okanagan. These multipliers must be estimated by using the available information concerning Victoria. The Victoria tourist multipliers computed in 1977 can appropriately be used in achieving this goal. With the absence of reliable data for regional input-output at worst, the Victoria figures would

TABLE 4.1

A COMPARISON OF VARIOUS TOURISM MULTIPLIERS USING THE ARCHER METHOD

	Income Multipliers				Employment Multipliers			
	All Tourists	Overnight	Day Trippers	Convention	All Tourists	Overnight	Day Trippers	Convention
	(per unit of tourist expenditure)				(per $1,000 of tourist expenditure)			
Okanagan	.731	.713	.659	.765	.091	.094	.078	.083
Victoria (1977)	.647	.647	.637		.103	.102	.114	
Bermuda (1975)	1.100							
Keswick, Cumbria (1976)	.348	.371	.302		.141	.144	.139	
Greater Tayside (1973)	.319	.321	.292		.192	.141	.153	

SOURCES:

Brian Archer, "The Anatomy of a Multiplier," Regional Studies, 10, (1976), pp. 71-77.

Brian Archer, Tourism in the Bahamas and Bermuda: Two Case Studies, Bangor Occasional Papers in Economics, No. 10. (Bangor: University of Wales Press, 1977), pp. 35, 43, 72.

Brian Archer, The State of the Art, Bangor Occasional Papers in Economics, No. 11 (Bangor: University of Wales Press, 1977), pp. 45-64.

B.H. Archer and K.R. Jones, Tourism in Appleby, Keswick and Sedberg, (Bangor: Institute of Economic Research, 1977), pp. 68, 78.

Scottish Tourist Board, The Economic Impact of Tourism: A Case Study in Greater Tayside by D.M. Henderson and R. Lee Cousins (Edinburgh: Tourism and Recreation Research Unit, 1975), p. 121.

Juanita C. Liu, "The Economic Impact of Tourism on an Island Economy: A Case Study of Victoria, B.C.," Ph.D. Dissertation, Simon Fraser University, 1979.

represent ceiling values but still would be in the relevant range. A factor that reduces Victoria multipliers is that more campgrounds are used in Tofino and Ucluelet than Port Alberni and Victoria.

As estimated in the Background/Technical Report, there were between 611,400 and 620,100 visitor days in the area in 1979. Visitor and Resident Survey Analysis breaks down the 620,100 visits to the area as follows:

Out of Province Overnight Visitors (days)	289,800
B.C. Residents Overnight Visitors	271,400
Day Visitors	58,900
Total	620,100

As indicated in the Background Technical Report (p. 144), more than half (55%) of the B.C. resident travellers live in the Lower Mainland area. Approximately 18% live on the Island itself and the remaining 27% come from other parts of the Province. Using these figures we obtain a new breakdown as follows:

Non-resident Overnight Visitors (days)	512,348
Island Resident Overnight Visitors	48,852
Day Trippers	58,900
Total	620,100

Using daily expenditure figures which are $9.56 for Tofino and Ucluelet, $7.80 for Port Alberni and $6.45 for day trippers, we can estimate the magnitude to tourist spending in the area in terms of the above tourist breakdown. In order to be a conservative an overall $8.50 per day per visitor spending for overnight visitors and $6.50 for day trippers is used. Using these modest figures, spending estimates for the above categories are:

Overnight visitors	- out of province	$ 2,463,300
	- B.C. residents	1,891,658
	- Island residents	451,242
Day trippers		379,905
	Total Spending	$ 5,150,105

The main reason of categorizing tourist spending in this way stems from the findings of the Victoria and Okanagan studies. These studies have shown that multiplier effects of these three distinct groups are quite different and they should be treated separately.

Table 4-2 gives the Tourist Income and Transactions multipliers in Victoria, in terms of direct, indirect, and induced income and transaction multipliers. Table 4-3 uses a more detailed classification, yet gives the same multipliers for another tourist area in British Columbia, namely the Okanagan.

Tables 4-4 and 4-5 are devoted to employment multipliers in both areas. Table 4-6 reveals direct and total input coefficients for government revenues and imports per dollar of tourist spending.

Application to the Study Area

In 1983 (Table 4-7) the estimated number of tourists visiting Vancouver Island was 3,373,000. Of this, there were approximately 578,000 visits to the study area. In Table 4-8 an attempt was made to break down this total figure in terms of three distinct tourist groups:

Overnight non-resident	431,000
Overnight Island resident	94,000
Day trippers	53,000
Total	578,000

TABLE 4-2

TOURIST INCOME AND TRANSACTIONS MULTIPLIERS IN VICTORIA

CATEGORY OF TOURIST	Normal Income					Ratio Income		TRANSACTIONS
	DIRECT (1)	INDIRECT (2)	DIRECT & INDIRECT (3)	INDUCED (4)	TOTAL (5)	TYPE I (3)÷(1)	TYPE II (4)÷(1)	
		(per $1 of tourist spending)						
Overnight Visitors								
Non-residents	.314	.167	.481	.167	.648	1.532	2.062	1.498
Van. Is. residents	.299	.180	.479	.165	.644	1.600	2.154	1.530
Average	.312	.169	.481	.166	.647	1.542	2.075	1.503
Day-Trippers	.291	.182	.473	.164	.637	1.627	2.190	1.532
All Tourists	.311	.169	.480	.167	.647	1.545	2.079	1.504

TABLE 4-3

TOURIST INCOME AND TRANSACTION MULTIPLIERS IN OKANAGAN

CATEGORY OF TOURIST	Normal Income DIRECT (1)	 INDIRECT (2)	(per $1 of tourist spending) INDUCED (3)	 TOTAL (4)	Ratio Income TYPE I (1+2)÷(1)	 TYPE II (4)÷(1)	TRANSACTIONS
Non-residential	.377	.099	.240	.716	1.264	1.901	1.319
Convention Delegates	.406	.103	.256	.765	1.253	1.885	1.340
Day-Trippers	.367	.071	.221	.659	1.194	1.796	1.239
Residential (B.C.)	.377	.095	.238	.710	1.252	1.883	1.302
All Tourists	.400	.086	.245	.731	1.214	1.827	1.300

TABLE 4-4

EMPLOYMENT MULTIPLIERS FOR VICTORIA
(Per $1,000 of Tourist Spending)

Category of Tourist	Direct Employment Accom- modation	Direct Employment Non- Accom- modation	Direct Employment Total	Indirect Employment	Total Employment
Overnight Vis.					
Non-resident	.008	.038	.046	.022	.101
Vancouver Is. Res.	.005	.043	.048	.025	.105
Average	.008	.039	.046	.023	.102
Day-trippers	.002	.054	.055	.026	.114
All tourists	.007	.039	.047	.023	.102

TABLE 4-5
EMPLOYMENT MULTIPLIERS FOR OKANAGAN
(per $1,000 of Tourist Spending)

CATEGORY OF TOURISTS	DIRECT EMPLOYMENT	INDIRECT EMPLOYMENT	INDUCED EMPLOYMENT	TOTAL EMPLOYMENT
Non-residential	.043	.012	.039	.094
Convention Delegates	.035	.011	.037	.083
Day-Trippers	.034	.009	.035	.078
Residential (B.C.)	.043	.012	.038	.093
All Tourists	.041	.011	.039	.091

TABLE 4-6

DIRECT AND TOTAL INPUT COEFFICIENTS FOR GOVERNMENT REVENUES AND IMPORTS
(Per $1 of Tourist Spending)

Category of Tourist	Government Revenue					Import Content	
	Direct Municipal	Direct Provincial	Direct Federal	Total Direct	Total	Direct	Total
Overnight Visitors							
Non-resident	.019	.034	.084	.136	2.15	.138	.335
Vancouver Island Res.	.016	.030	.082	.129	.209	.146	.349
Average	.018	.033	.083	.135	.213	.139	.338
Day-Tripper	.013	.026	.077	.116	.192	.178	.380
All tourists	.018	.033	.083	.134	.213	.140	.339

TABLE 4-7

VISITORS - 1979-1983

	VANCOUVER	ESTIMATED - PORT ALBERNI AND CLAYOQUOT
1979	3,501,000	600,000
1980	3,395,000	582,000
1981	3,388,000	581,000
1982	3,411,000	585,000
1983	3,373,000	578,000

TABLE 4-8

BREAKDOWN OF VISITORS TO ALBERNI AND CLAYOQUOT REGION

1979-1983

	OVERNIGHT NON RESIDENT	OVERNIGHT RESIDENTS	DAY TRIPPERS	TOTAL
1979	447,000	98,000	55,000	600,000
1980	432,000	95,000	53,000	582,000
1981	432,000	95,000	53,000	581,000
1982	435,000	96,000	54,000	585,000
1983	431,000	94,000	53,000	578,000

SOURCE:

B.C. Model, B.C. Research, Vancouver. 1983

Since the study area is more rural and less diversified, the multiplier figures for Victoria were adjusted to consider these structural differences. Again, because of the lack of an appropriate regional inter-industry input and output table, the multiplier figures that are given in Table 4-9 and Table 4-10 are the best estimates. They are also comparable to other studies conducted in other regions. For example, the Victoria study reveals that $1,000 non-resident tourist spending creates .101 jobs, i.e. approximately $10,000 creates one full time job. Whereas, due to higher leakage from the smaller and less diversified regions, we estimate that in 1983 approximately $13,300 tourist spending will create one full time job. In the case of overnight island residents, $12,800, and $12,000 for day trippers, creates one full time job. Similarly, income and transaction multipliers were also adjusted downwards. Like all the multiplier studies, these figures assume that there will not be drastic structural changes in the production functions and inter-industry leakage in the economy. The study gives direct, indirect, induced and total economic impacts for income and employment.

For 1983 it is assumed that per person overnight visitors will spend $10 per day, and a day tripper will spend $7 per day. These figures are higher than 1979 figures which are $9.50 and $6.45 respectively, and represent real increases rather than inflationary rises.

Table 4-11, based on the above estimates, calculates estimated economic impacts on sales in the region. Total $5,621,000 tourist spending ends up with a sales (transactions) figure of $7,325,850. It is interesting to note that day trippers contribute nearly $500,000 towards sales volume in the region. The total income created by tourist spendings is $3,299,000 of which $1,639,500 is direct income.

TABLE 4-9

ADJUSTED INCOME AND TRANSACTION MULTIPLIER VALUES FOR ALBERNI-CLAYOQUOT REGION

	NORMAL INCOME				
	Direct	Indirect	Induced	Total	Transaction Multiplier
Overnight Non-Residential	.300	.150	.150	.600	1.300
Overnight Residents of the Island	.270	.155	.150	.575	1.300
Day-Trippers	.250	.160	.150	.560	1.350

TABLE 4-10

ADJUSTED EMPLOYMENT MULTIPLIER VALUES FOR ALBERNI-CLAYOQUOT REGION (FOR $1000 TOURIST SPENDING)

	Direct Employment	Indirect Employment	Induced Employment	Total
Overnight Non-Residential	.035	.015	.025	.075
Overnight Residents of the Island	.037	.016	.025	.078
Day-Trippers	.042	.016	.025	.083

TABLE 4-11

ESTIMATED INCOME AND SALES (TRANSACTIONS) GENERATION IN ALBERNI-CLAYOQUOT

1983

		Estimated Impacts Income				
	Estimated Tourist Expenditures	Direct	Indirect	Induced	Total	Trans-action
Overnight Non-Residential	4,310,000	1,293,000	656,500	646,500	2,586,000	5,603,000
Overnight Island Residents	940,000	253,800	145,700	151,000	540,500	1,222,000
Day-Trippers	371,000	92,750	59,360	20,646	172,756	500,850
	5,621,000	1,639,550	851,560	808,146	3,299,256	7,325,850

TABLE 4-12

ESTIMATED EMPLOYMENT GENERATION THROUGH TOURIST SPENDING IN ALBERNI-CLAYOQUOT REGION

1983

	Estimated Tourist Expenditure	Direct Employment	Indirect Employment	Induced Employment	Total Employment
Overnight Non-Residential	$4,310,000	151	65	108	324
Overnight Island Residents	940,000	35	15	24	74
Day-Trippers	371,000	16	6	9	31
	$5,621,000	202	86	141	423

Table 4-12 focuses on the estimated job generation through tourist spending. According to our computations, in 1983 tourists created 429 jobs of which 202 jobs were direct, 86 jobs indirect, and finally 141 jobs due to induced impact of tourist spending.

Tourist spending increases jobs, incomes, and sales and thereby increases government revenues at every level. Table 4-13 shows this impact on government receipts. It is estimated that the $5,621,000 tourist spending contributed directly over $100,000 towards municipal revenues. When the indirect and induced effects are taken into consideration, this figure approaches approximately $158,000 for 1983.

The provincial direct revenues are $184,000 and total provincial revenues including other impacts are about $292,000. Of course the largest beneficiary is the Federal Government, as shown in Table 4-13 but municipal and provincial revenues combined, make up about 38% of total revenues created by the tourist spendings in the region.

The impacts that are given in Tables 4-11 to 4-13 are subject to the seasonal fluctuations in tourist flows. As is mentioned in the Background/Technical Report (p. 154), Vancouver Island seasonality has less sharp changes than B.C. and Canada as a whole. Specifically in 1982:

Quarter				
1	2	3	4	
18%	26%	34%	22%	= 100%

It is noted that 44% of visitors came during the first six months and 56% come in Summer and Fall. Consequently, the income, transactions, employment, and governmental revenues will fluctuate accordingly. Particularly, due to higher spendings during second and third quarters, seasonal workers, as it is the current practice, will be hired. However, our figures give full time job equivalents. The number of work force participants will be much

TABLE 4-13

IMPACT ON GOVERNMENT REVENUES FROM TOURIST SPENDING ALBERNI CLAYOQUOT REGION

1983

	Estimated Tourist Spending	Direct Municipal	Direct Provincial	Direct Federal	Total Direct	Total
Overnight Non-Res.	$4,310,000	81,890	146,540	362,040	590,470	926,650
Overnight Island Res.	940,000	15,040	28,200	77,080	120,320	196,460
Day-Trippers	371,000	4,823	9,646	28,567	43,036	71,232
	$5,621,000	101,753	184,386	467,687	753,826	1,194,342

higher than indicated because of the shorter time worked by seasonal workers. Sales tax revenue and excise taxes will follow rather a close parallel to the seasonality of the region.

A study done by AVG Management Science Ltd.[1] estimates that in 1978 there were 14,200 jobs in the area. Of these, primary industry employed 2,850, construction and manufacturing, 5,810 and total tertiary, 5,540. It is also forecasted that there would be 14,350 (only a very modest increase) jobs in 1981, 16,380 in 1991. Considering the fact that forest products employ 6,300 and fish products employ 1,300 persons, the impact of tourist related job creation plays an important role in the economy of the region. The 429 jobs given in Table 4-14 represent a sizeable contribution at the present time. The same source also indicates a growth of 1,500 jobs from tourism that will be created by 1991.

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[1] AVG, Management Science Ltd., Alberni-Clayoquot Region Economic Profile, 1980. p. A3.

4.2 IMPACT ANALYSIS

Based on the proposed development opportunities it is possible to analyse expenditures by destination area and priority level.

Port Alberni Destination Area:

(Number of Projects)	Construction Cost	Yearly O/M Cost	Employment
Priority I - (6)	$ 1,343,000	$150,000	23.5 m/y
Priority II - (5)	1,145,000	115,000	2.0 m/y
Priority III - (5)	2,150,000	95,000	8.0 m/y
Total (16)	$ 4,638,000	$360,000	33.5 m/y

Tofino Destination Area:

Priority I - (6)	$ 6,562,000	$122,000	24.5 m/y
Priority II - (6)	5,820,000	106,000	9.5 m/y
Priority III - (1)	750,000	20,000	2.0 m/y
Total (13)	$13,132,000	$248,000	36.0 m/y

Ucluelet Destination Area:

Priority I - (4)	$ 2,277,000	$ 35,000	14.0 m/y
Priority II - (2)	155,000	8,000	1.0 m/y
Priority III - (3)	1,200,000	18,000	-
Total (9)	$ 3,632,000	$ 61,000	15.0 m/y

Bamfield Destination Area:

Priority I - (2)	$ 1,225,000	$ 26,000	4.0 m/y
Priority II - (3)	825,000	11,500	5.5 m/y
Priority III - (3)	920,000	16,000	4.5 m/y
Total (8)	$ 2,970,000	$ 53,500	14.0 m/y
GRAND TOTAL (46)	$24,372,000	$722,500	98.5 m/y

The identified 46 projects require $24,372,000 in construction costs. The impact of this construction cost in terms of job creation and transaction can be estimated by using appropriate multipliers. Tables 4-14 and 4-15 give an indication of various multipliers in British Columbia. Again, it is expected that construction multipliers will be smaller in the Alberni-Clayoquot region. For the purpose of this study, the direct income multiplier is estimated to be .200, indirect income multiplier .150, induced income multiplier .125 and finally the transaction multiplier 1.400. In case of an employment multiplier of .120, employment per $1,000,000 new sales seems reasonable for the region. The lower multiplier figures stem from the fact that there are more leakages from the economy than there would be for Vancouver or Victoria.

Considering this background, the impact of construction activity due to proposed projects in all destination areas is given in Table 4-16.

If all the projects are undertaken, the total jobs created due to construction would be 2,924 and total income generated would be approximately $11,577,000. Total sales generated would be over $34,000,000.

The second set of impacts are given in the numbers of jobs created by the operation of facilities. The proposed projects will create close to 100 full time equivalent jobs. If Priority I projects are undertaken, the number of new jobs would be 66 (approximately two thirds of total jobs). In this category, on the average, a $172,000 investment creates one full time equivalent job. On the other hand, required investments for Priority II is $441,000 and Priority III is $346,000.

In relation to the proposed project it is necessary to indicate that a number of jobs would be temporary (41 jobs, 16 full-time equivalent) and would be limited to the construction period. These jobs are not included to the overall 98.5 jobs given at the

TABLE 4-14

SECTOR MULTIPLIER FOR VICTORIA

Industrial Sector	Direct Income	Indirect Income	Induced Income	Total Income	Transactions
		(Per $1 of Turnover)			
Primary	.238	.049	.099	.386	1.154
Construction	.243	.172	.144	.558	1.524
Manufacturing	.277	.050	.113	.441	1.155
Wholesale Trade	.087	.108	.068	.263	1.285
Retail Trade	.134	.217	.121	.472	1.540
Transportation	.314	.210	.182	.705	1.638
Communications and Utility	.379	.175	.192	.747	1.488
Finance	.589	.141	.253	.983	1.321
Service	.339	.101	.152	.592	1.286
Restaurant	.393	.162	.192	.747	1.542
Accommodation	.413	.134	.189	.736	1.430
Aggregate	.278	.094	.129	.502	1.066

NOTES:

Government Revenues are excluded from the direct income coefficients but are included in the indirect and induced elements.

SOURCE:

Juanita Liu, The Economic Impact of Tourism on an Island Economy: A Case Study of Victoria, B.C. Unpublished Ph.D. Dissertation, Simon Fraser University, 1980, p.77.

TABLE 4-15

VANCOUVER MULTIPLIERS

	Sales	Employment *	Household Income
Construction	1.81	147	.94
Food & Beverage	1.61	46	.48
Wood Products	1.55	66	.62
Chemicals & Petroleum	1.17	12	.13
Manufacturing (n.e.s.)	1.54	50	.62
Trade & Transportation	1.69	78	.82
Health & Welfare	1.71	55	.95
Education	1.88	83	.98
Households	.95	41	1.42

* Employment per $1 million of new sales

SOURCE:

Mark L. Ford, "A Linear Programming Model of the Vancouver Metropolitan Area Economy", M.A. Extended Essay, Simon Fraser University. 1980, p. 241.

TABLE 4-16

IMPACT OF CONSTRUCTION

		Direct Income	Indirect Income	Induced Income	Total Income	Total Transactions	Total Employment
Priority I	$11,407,000	$2,281,400	$1,711,050	$1,425,875	$ 5,418,325	$15,969,800	1369
Priority II	7,945,000	1,589,000	1,191,750	993,125	3,773,875	11,123,000	953
Priority III	5,020,000	1,004,000	753,000	627,500	2,384,500	7,028,000	602
	$24,372,000	$4,874,400	$3,655,800	$3,046,500	$11,576,700	$34,120,800	2924

beginning of this section. These 98.5 full time equivalent jobs represent 199 seasonal, 22 part-time, and 30 full time permanent jobs.

The proposed projects would also require an additional operation and maintenance expenditure of approximately $722,500 per year. However, the impact of these expenditures is almost impossible to predict at this level of detail. They would have various impacts depending on the sector or sectors that spending takes place. Once that detail is known by using available data, an estimate of impact can be made.

These proposed projects will definitely affect the tourist flows and magnitude of tourism receipts in the region. These kind of impacts are quantified and given in the following sector.

The economic impacts of the proposed projects as it was mentioned in earlier section constitutes only one parameter. The other parameters are social and environmental In general, the projects are carefully chosen in order to alleviate these other impacts. Currently, the existence of a given tourist population in the area and planned growth strategy would lessen, if there is any, the non-quantifiable negative impacts. Detailed descriptions of each project in Section 3.4 achieves this objective.

Conclusion

The proposed 46 projects in three priority groups will, in the construction stage, generate $34,000,000 in transactions, 2,924 jobs and $11,576,700 in total income, for the region. The required investment is $24,372,000. In addition it is expected that the projects will generate approximately 98.5 full time equivalent permanent jobs.

The social and environmental impacts due to the fact that Vancouver Island currently is one of the best known and visited, tourism regions in British Columbia, will tend to be more positive than negative. However the communities that are to be affected should keep these possible effects in mind before reaching a final decision to proceed with the proposed development.

4.3 SOCIO-ECONOMIC IMPACTS

The economic benefits of tourism on the region and a breakdown of visitors to The Alberni/Clayoquot Regional District were provided in 3.6.1. The impacts of the proposed investment projects, especially in terms of their construction costs, operating and maintenance expenses, and job creation were presented in 3.6.2. Now we look at the demand side of the picture. In this section first we will estimate the number of visitors and their spending from 1983 to 1993 (Table 4-17).

The basis of this projection is 3.18% annual growth in overnight visitors between 1983-1993 and 6.67% annual growth in day-trippers. These are average compared growth rates for the period covered. Due to the Olympic Games, 1984 is expected to be the lowest point. Due to Expo 86, 1986 will be an extraordinary year for tourism spending on the Island. In 1986, a total of $4,425,000 income and 566 jobs will be attributed to tourist spending in Alberni-Clayoquot.

On the other hand in 1993 total income attributable to tourism will be $5,853,000. There will be 754 jobs attributable to tourist spending. This figure is considerably lower than the figure forecast by AVG Management Science Ltd. for 1991[1]. AVG estimates that there will be an additional 1,500 jobs coming directly from increased tourism. We believe that this figure overestimates the impact of tourist spending.

It is expected that an additional 49,000 tourists will visit the study area during Expo 86. In 1993 the total number of tourists visiting the Alberni-Clayoquot Region will reach to 850,000. Of this, 611,000 will be non-resident overnight, 134,000 overnight-Island residents, and finally 105,000 day trippers. This increase

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[1] AVG Management Science Ltd., Alberni-Clayoquot Region Economic Profile, May 1980, p. A-3.

TABLE 4-17

ESTIMATED VISITORS TO ALBERNI-CLAYOQUOT REGION

1983-1993

	Overnight Non-Resident	Overnight Island Residents	Day-Trippers	Total
1983	431,000	94,000	53,000	578,000
1984	400,000	88,000	49,000	537,000
1985	467,000	102,000	57,000	626,000
1986	528,000	105,000	64,000	697,000
1993	611,000	134,000	105,000	850,000

comes from the additional attractions and accommodation facilities proposed in Section 3.4, as well as population increase in the target area.

Tourist spending will also rise due to better facilities and increased income of tourists during the next decade. The estimated tourist spendings, by categories of tourist, are given below:

	1983	1986	1993
Overnight Non-resident	$10.00	$11.00	$12.00
Overnight Island-Resident	10.00	11.00	12.00
Day-Trippers	7.00	7.70	9.00

These are in terms of 1979 dollars and 1986 represents the unusual event of Expo 86. They indicate a modest increase in real terms between 1983 - 1993. Inexpensive accommodation facilities (campgrounds) will lower spending but improved hotel and motels will increase daily expenditures, thereby the overall increase is expected to be rather moderate.

Given these projections, Tables 4-18 through 4-22 estimates income, transaction, employment, and governmental revenue impacts of the tourist.

In this section we have also attempted to quantify the impact of Expo 86 on the Alberni-Clayoquot Region. Table 4-23 achieves this objective by segregating normal demand from the increased demand due to Expo 86.

It is estimated that Expo 86 will generate an additional 88 jobs and approximately $700,000 extra income.

TABLE 4-18

ESTIMATED INCOME AND SALES (TRANSACTIONS) GENERATION IN ALBERNI-CLAYOQUOT REGION

1986

	Estimated Tourist Expenditures	Estimated Impacts Income				Transactions
		Direct	Indirect	Induced	Total	
Overnight Non-Residents	$5,808,000	1,742,400	871,200	871,200	3,484,800	7,550,400
Overnight Island Residents	1,155,000	311,850	179,025	173,250	664,125	1,501,500
Day-Trippers	492,800	123,200	78,848	73,920	275,968	665,280
	$7,455,800	2,177,450	1,129,073	1,118,370	4,424,893	9,717,180

TABLE 4-19

ESTIMATED EMPLOYMENT GENERATION THROUGH TOURIST SPENDING IN ALBERNI-CLAYOQUOT REGION

1986

	Estimated Tourist Expenditures	Direct Employment	Indirect Employment	Induced Employment	Total Employment
Overnight Non-Resident	5,808,000	203	87	145	435
Overnight Island Resident	1,155,000	43	18	29	90
Day-Trippers	492,800	21	8	12	41
	7,455,800	267	113	186	566

TABLE 4-20

ESTIMATED INCOME AND SALES (TRANSACTIONS) GENERATION IN ALBERNI-CLAYOQUOT REGION

1993

	Estimated Tourist Expenditures	Normal Income				Transaction
		Direct	Indirect	Induced	Total	
Overnight Non-Resident	$7,332,000	2,199,600	1,099,800	1,099,800	4,399,200	9,531,600
Overnight Island Resident	1,608,000	434,160	249,240	241,200	924,600	2,090,400
Day-Trippers	945,000	236,250	151,200	141,750	529,200	1,275,750
	$9,885,000	2,870,010	1,500,240	1,482,750	5,853,000	12,897,750

TABLE 4-21

ESTIMATED EMPLOYMENT GENERATION THROUGH TOURIST SPENDING IN ALBERNI-CLAYOQUOT REGION

1993

	Estimated Tourist Expenditures	Direct Employment	Indirect. Employment	Induced Employment	Total Employment
Overnight Non-Residents	$7,332,000	257	110	183	550
Overnight Island Residents	1,608,000	59	26	40	125
Day-Trippers	945,000	40	15	24	79
	$9,885,000	356	151	247	754

TABLE 4-22

IMPACT ON GOVERNMENT REVENUES FROM TOURIST SPENDING

1993

	Estimated Tourist Spending	Direct Municipal	Direct Provincial	Direct Federal	Total Direct	TOTAL
Overnight Non-Residential	$7,332,000	139,308	259,288	615,888	1,004,484	1,576,380
Overnight Island Residents	1,608,000	25,728	48,240	131,856	205,824	336,072
Day-Trippers	945,000	12,285	24,570	72,765	109,620	181,440
	$9,885,000	177,321	322,098	820,509	1,319,928	2,093,892

TABLE 4-23

ESTIMATED IMPACT OF EXPO 86 ON ALBERNI-CLAYOQUOT REGION

	WITH EXPO 86		WITHOUT EXPO 86	
	Income Generated	Jobs Generated	Income Generated	Jobs Generated
Overnight Non-Residents	$3,484,800	435	2,891,310	361
Overnight Island Residents	664,125	90	605,147	82
Day-Trippers	275,968	41	238,343	35
	$4,424,893	566	3,734,800	478

4.3.1 Social Impacts

Tourism, like many other industries, is often used as a development tool for economic and social change within a region or local economy. Since it generates new employment opportunities for a large number of residents, tourism also creates new working relationships. Due to the proposed development plan, a modest change in the Alberni-Clayoquot Region is inevitable. One impact would be the transfer from other industries, either (forestry, fisheries), or the ranks of the unemployed, to tourism related jobs.

An important issue is the way in which residents perceive tourism. Because there is a large body of literature on the perceived impact on tourism, an in-depth review would be prohibitively lengthy. It seems that in general, the area residents have a favourable perception of tourism. It is not expected that traditional forces of socializing among the resident will decrease in the study area because the proposed strategy does not foresee a rapid growth in an entirely new tourism area. It should not be forgotten that Alberni-Clayoquot is a part of an already developed larger region of Vancouver Island.

Tofino's community cohesiveness, in particular, is expected to make a positive contribution to tourism. Bamfield, while very skeptical about tourism, nevertheless has a level of sophistication that can be channeled to specific activities without negative social impacts.

Tourism development should also be aware of overcrowding[1] and related strain, on community services. However, governmental revenues, due to increase in municipal, provincial and federal taxes, are expected to overcome most negative impacts by providing newer services to the communities.

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[1] K.W. Kendall and Turgut Var, The Perceived Impact of Tourism: The State of the Art, Tourism Research Publications Occasional Paper, No. 6, Social Science Research Institute, University of Hawaii, 1984, p. 3.

Finally, it is expected that proposed development projects will also contribute towards preservation of the unique West Coast native culture. Handicrafts production and tourism cultural events will create a better understanding of this culture among both resident and non-resident tourists.

In conclusion, social and cultural impacts of the proposed development are expected to be positive rather than negative. This conclusion stems from the fact that in the project development stage, we have tried to follow a bottom up approach rather than a top-down planning strategy. Inputs from communities have been given considerable weight in formulating development proposals. Like everything else, there is a trade-off between jobs and sacrifices that tourism development might demand. In our opinion, those communities already expressed a desire to develop their tourism potential and have already made the choice and indicated their tradeoff positions.

[illegible]

[illegible]

[illegible]

[illegible]

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[1] [illegible] Social Science Research Institute, University of Hawaii, [illegible]

5. IMPLEMENTATION STRATEGY

5.1 DEVELOPMENT PRIORITIES

The implementation strategy for the various development opportunities (Section 5.4) has been established based on an analysis of various priority options and the selection of a development orientation and schedule that reflects:

- the specific goals and objectives of the strategy
- the tourism strategy aims
- the overall development theme and concept
- the potential benefits of preparing for increased visitation generated by Expo 86
- the ability of the community to absorb new tourism development
- the potential to attract investment capital to the region
- funding potential
- the nodal/corridor approach to development.

Development priorities can be considered from three different perspectives:

a) Tourism Destination Areas

b) Expenditure by tourism sectors (attractions, services, information, etc.)

c) Capital intensive projects vs labour intensive projects.

5.1.1 Tourism Destination Areas

Four priority options can be generated, based on different perspectives of the role and future of the primary destination areas.

In each option, a specific destination area would be designated to proportionately receive the larger share of investment capital and job creating projects.

For instance, Option I would assume that the Port Alberni Destination Area would be the major recepient of investment and so on as outlined below.

Port Alberni Destination Area	Option I
Ucluelet Destination Area	Option II
Tofino Destination Area	Option III
Equal Distribution Among Each Primary Destination Area	Option IV

Option I - Port Alberni Destination Area

Advantages

- as the largest municipality it has half of the tourism services in the region and could support major development;

- unemployment created by the shifts in the forest industry would be reduced;

- as the entrance or gateway to the region, it has the possibility to attract and hold tourists for a longer period;

- the overall destination area has a wider selection of tourism attractions which can appeal to broader market segments.

Disadvantages

- the coastal attractions, including Pacific Rim National Park, will continue to be the main reason for visiting the region and the high capital expenditure in Port Alberni would not significantly alter that primary travel flow.

Option II - Ucluelet Destination Area

Advantages

- Ucluelets' unique location, between the regions primary land-based attraction (Pacific Rim National Park) and primary water-based attraction (Barkley Sound) enables the community to play a key role as a service and staging area for travellers, most of whom have the coast as a destination.

- the existing tourism service base in Ucluelet (the largest on the coastline) could readily respond to increased tourism flow caused by additional attraction development.

Disadvantages

- Ucluelet has not yet established itself as a destination area, in the way that Tofino has;

- concentrating tourism development in Ucluelet would not enable the two coastline communities to equally participate in the development and benefits of regional tourism.

Option III - Tofino Destination Area

Advantages

- The District Municipality of Tofino has the most attractive and appealing setting in the region and its beaches, proximity to Meares Island, and the National Park will continually make it the most popular area.

- the municipality has a positive attitude towards tourism development that encourages the investment community.

Disadvantages

- Intensive capital investment could have a negative impact on the quality of life of the local citizens, and risk turning their present openness toward tourism into a rejection of the industry;
- excessive capital investment would not enable balanced growth throughout the coastal area.

Option IV - Equal Distribution Among Each Destination Area

Advantages

- The entire mosaic of natural and cultural resources can be developed for the benefit of all citizens;
- a greater variety of attractions can appeal to a broader market spectrum, thus increasing visitation;
- balanced tourism development in each of the major destination areas strengthens regional economic growth.

Disadvantages

- In the initial stages of developing the region, it may be necessary to promote investment in areas that are not presently perceived, in the market place, as significant destinations;
- areas that are immediately receptive to tourism development may have to postpone growth and risk lowering overall potential performance.

Selected Option

While each of the proposed options have merit, Option IV is presented as the most relevant to the long term establishment of

Alberni-Clayoquot as a marketable and competitive tourism region. Figure 5-1 outlines the evaluation of each option. The main reasons are as follows:

- it responds to the orientation of the overall development concept;

- provides a greater range of opportunities to support the various aims of the strategy i.e., increase length of stay, and expenditure, provide shoulder season attractions, and increase overall volume by providing more possibilities for new product development and market expansion;

- disperses the community impacts and economic benefits throughout the region.

5.1.2 Expenditure by Tourism Sector

Three options were analyzed, each investigating the relative merits of priority investment in each of the following three tourism sectors:

- attraction development
- service development
- information/marketing

Option I - Attraction Development

Advantages

- new attraction development will compliment the existing natural attractions, provide more all-weather activities and provide more tourism components to draw people to the region.

OPTIONS / EVALUATION CRITERIA	GOALS AND OBJECTIVES	STRATEGY AIMS	DEVELOPMENT THEME/CONCEPT	BENEFITS - EXPO '86	COMMUNITY CAPACITY	POTENTIAL INVESTMENT CAPITAL	NODAL/CORRIDOR APPROACH	FUNDING POTENTIAL	TOTALS
DESTINATION AREAS									
Option I	2	2	1	1	3	1	1	2	13
Option II	1	2	1	2	2	2	1	2	13
Option III	2	2	1	3	2	3	1	3	17
Option IV	3	3	3	2	3	2	3	3	22
EXPENDITURE BY SECTOR									
Option I	2	3	2	1	1	1	2	1	13
Option II	2	3	2	2	2	3	2	1	17
Option III	3	3	3	3	3	2	2	3	22
EXPENDITURE BY TYPE									
Option I	2	2	3	2	1	3	3	1	17
Option II	3	3	3	3	3	2	2	3	22

1 - Lower Impact
2 - Moderate Impact
3 - Higher Impact

DEVELOPMENT IMPACTS
AND PRIORITY LEVELS

Figure 5-1

Disadvantages

- attractions and their associated commercial/retail ventures risk financial difficulties if overall visitation and shoulder season demand is not sufficient.

Option II - Service Development

Advantages

- quality tourism services increase the opportunity for favourable and memorable visitor experiences thus providing similar benefits to attraction development, i.e. generating a positive perception of the region, increasing its competitiveness with well establish regions such as Qualicum-Parksville and the Gulf Islands, etc.

Disadvantages

- a well developed service base requires almost exclusive investment from the private sector. If it is not supported by a strong attraction component and promoted by solid marketing, the consequence will be low visitation and insufficient off-season markets. This will result in poor economic performance by the service sector resulting in reduced product quality, and investor dissatisfaction.

Option III - Information/marketing

Advantages

- Alberni-Clayoquot has many existing natural attractions and a large service sector, albeit not equally distributed throughout the region. Intensive marketing will bring more tourists to the region and adequate regional information will disperse them throughout, for the benefit of each area and their respective attractions and services sectors.

Disadvantages

Continuous marketing must be matched by adequate growth and product development in the attraction and service sector. If this does not happen there will be a loss of consumer confidence in the area thus decreasing visitation, establishing a negative image in the primary market and encouraging wholesalers to seek other destination areas.

Selected Option

The options evaluation matrix (Figure 5-1) would suggest that Option III is preferred. However, the selection of this alternative must be made, considering the advantages of the other two approaches.

Therefore, while Priority I will emphasize information and marketing, it must also be done in concert with the addition of certain attractions as well as an initial tourist services development or upgrading in order to respond to the marketing efforts.

5.1.3 Expenditure by Type

Capital Intensive Projects vs Human Resource Centered Projects

Option I - Capital Intensive Projects

Advantages

- creates immediate impact on the visitor and local citizen's perception of the importance of regional tourism development;
- creates employment in the construction sector;
- provides a balance to the existing core attraction base.

Disadvantages

- requires immediate political/citizen/community efforts to raise the required capital investment from the private and public sector;
- difficult to acquire government or private investment since the tourism industry is just starting to turn around following the recent economic recession;
- the projects may place major demand on the limited equity/ capital position of locals citizens.

Option II - Human Resource Centered Projects

(i.e. Festivals, special events, tour organizations, tourism association)

Advantages

- creates immediate involvement by many citizens in tourism development without taxing their limited financial resources.
- the projects have a short start-up time and show immediate benefits to the community;
- potentially involves a large cross-section of the public and creates the type of participation/animation that is popular with tourists.

Disadvantages

- does not have the high profile of capital intensive projects.

Selected Option

The evaluation matrix indicates that Option III responds to the existing situation and consequently becomes part of Priority I.

5.1.4 Priority Groups Summary

a) Destination Areas

Those projects that promote a balanced development in each of destination areas will be included in Priority I. The following developments indicate how this will be done:

Attractions - each destination area will have a main attraction scheduled for development in the initial years of implementation. For example:

Port Alberni - Harbourfront
Ucluelet - MacMillan Island Fisheries Exhibit
Tofino - Fishermans Village
Bamfield - Boardwalk

Accommodation - Ucluelet and Tofino will each have destination resort development which will be balanced by a campground and attraction development to complement the existing accommodation plant in Port Alberni.

b) Expenditure by Tourism Sectors

Emphasis will be placed, in Priority I, on marketing this new tourism region and assuring that tourists are familiar with the features after they have arrived (information).

This will be followed by attraction development (Priority II) and service development (Priority III).

c) Capital vs Human Resource Projects

Those project that are labour intensive and can be readily provided by the local citizens, without a major capital commitment will be Priority I. Emphasis will also be placed on job creation in priority I. The various projects are summarized in Figure 5-2.

PRIORITY LEVELS BY DESTINATION AREA

Figure 5-2

	PRIORITY I	PRIORITY II	PRIORITY III
PORT ALBERNI DESTINATION AREA			
Information	. Municipal Signage Area Brochure		
Attractions	. Harbourfront . Mill Tours . Salmon Festival	. Lady Rose II . Charter Boat . Argyle Street Streetscaping . Della Falls Corridor	. Sea Safety Museum . Mt. Arrowsmith Upgrading . Sproat Lake Water Park
Services	. Municipal Campground Phase I . Regional Transportation - Phase I . Marina Expansion	. Municipal Campground Phase II . Ark Resort Upgrading . Regional Transportation - Phase II	. Sproat Lake Expansion . Ark Resort Upgrading . Stamp Falls Expansion . Charter Boats
UCLUELET DESTINATION AREA			
Information	. Street Signage Area Brochure		
Attraction	. MacMillan Island Fisheries Exhibit . Community Suppers And Events . Logging/Fish Plant . Tours		. Penninsula Ave. Streetscaping
Services	. Canadian Princess Resort . Recreation Vehicle Resort Campground	. Davison Plaza Upgrading	. Motel Upgrading . Charter Boats

	PRIORITY I	PRIORITY II	PRIORITY III
PACIFIC RIM NATIONAL PARK			
Services		. Campground Expansion Phase I	. Campground Expansion Phase II
BAMFIELD DESTINATION AREA			
Attractions	. Visitor Services (toilets, water)	. Bamfield Boardwalk . Boat Cruise . Area Trails Improvements	. Alternative Energy Display . Area Trails Improvements
Services	. Bamfield Campground	. Sports Fishing Accommodation . Marina	. Seasonal Accommodation Units

	PRIORITY I	PRIORITY II	PRIORITY III
TOFINO DESTINATION AREA			
Information/Organization	. Regional Tourism Association . Regional Brochure . Regional Information Centre - Phase I . Regional Market Research . Regional Signage		
Services	. Receptive Tour Operation	. Bed And Breakfast	. Community Host Program
		. Logging Road Maps . Tofino Airport	. Toquart Bay Campground . Port Alberni Airport
Attractions		. Regional Theatre	
REGIONAL DEVELOPMENT			
Information	. Street Signage Area Brochure		
Attraction	. Provincial Craft Festival . Fishermans Village . Native Cultural Centre/Museum . Community Suppers . Pacific Rim Golf Course	. Meares Island Exhibit Tour	. Underwater Marine Exhibit
Services	. Cox Bay Destination Resort/Campground . Tin-Wis Cultural Resort	. Motel Upgrading . Destination Resort II	

5.1.5 Development Proposal Costs

The following Table 5-3 summarizes, by destination area, the order of magnitude, construction and operation and maintanance costs, as well as the employment generated, in man-years, and those responsible for project development.

a) Order of Magnitude Costs

Costs have been provided for each development proposal. They are given in 1984 dollars and are based on:

- calculating global costs of each project component;
- experience from other similar tourism facilities in other regions; and
- discussions with local operators.

They have been estimated lower than facilities found in other regions due to the projected lower tourist volumes and the available cash/equity in the regions. On the other hand, calculations have taken into account the higher construction costs on the west coast.

Operation costs do not include salaries but do include insurance, taxes, utilities, etc.

b) Employment

Created jobs have been presented as:

- seasonal;
- part-time (not an entire seasonal position);
- temporary (not long term);

and total numbers respect the existing and potential available labour force.

ALBERNI- CLAYOQUOT REGIONAL TOURISM STRATEGY

DEVELOPMENT PROGRAM AND PROPOSAL

PROGRAM PROPOSAL	COST	YEARLY O/M COSTS (no salaries)	PRIORITY	EMPLOYMENT	RESPONSIBILITY
PORT ALBERNI DESTINATION AREA					
1. Harbourfront attractions and completion	$ 980,000	74,000	I	15 man/years	- City of Port Alberni - Port Alberni Harbour Commission
2. Lady Rose II	$ 250,000	50,000	II	1 full time 2 seasonal (2 m/y)	- Private operator
3. New Municipal Campground 100 campsites					
Phase I	$ 335,000	20,000	I	8 seasonal	- Chamber of Commerce
Phase II	$ 215,000		II	2.5 m/y	- City of Port Alberni - Private operator
4. Municipal Signage	$ 120,000	1,000	I	3 temporary (.5 m/y)	- City of Port Alberni
5. Mill tours	$ 12,000	3,000	I	3 seasonal (1 m/y)	- MacMillan Bloedel
6. Alberni Inlet/Barkley Sound Excursion Boats 1	$ 100,000	20,000	II	12 seasonal (3 m/y)	- Private operator
2	$ 75,000	12,000	III		
3	$ 75,000	12,000	III		
7. Sea-Safety Museum	$ 200,000	5,000	III	3 seasonal (1 m/y)	- City of Port Alberni - Regional District Alberni Clayoquot
8. Sproat Lake Water Park	$ 450,000	40,000	III	10 seasonal (4 m/y)	- Private operator
9. Downtown Streetscaping					
Third Avenue	$ 200,000	20,000	III	10 temporary (8 m/y)	- City of Port Alberni
Argyle Street	$ 100,000	10,000	II		- Merchants Association

Figure 5-3

PROGRAM PROPOSAL	COST	YEARLY O/M COSTS (no salaries)	PRIORITY	EMPLOYMENT	RESPONSIBILITY
10. Special Salmon Festival Events	$ 1,000	2,000	I	4 part time (1 m/y)	- City of Port Alberni
11. Della Falls Corridor	$ 250,000	5,000	II	6 temporary (.5 m/y)	- Regional District of Alberni Clayoquot - Strathcona Provincial Park
12. Mt. Arrowsmith Upgrading	$ 200,000	N/A	III	10 temporary (2 m/y)	- Mt. Arrowsmith Ski Association R.D.A.-C
13. Ark Resort Upgrading					
- Motel units	$ 150,000	30,000	II	3 temporary (1 m/y) work done by owner	- Private operator
- Marina	$ 50,000		III		
- Boat	$ 65,000		III		
14. Sproat Lake Campground Expansion (30 units)	$ 120,000	2,000	III	.5 m/y	- Sproat Lake Provincial Park
15. Regional Transportation					
Phase I (installation)	$ 120,000	50,000	I	16 seasonal (4 m/y)	- R.D.A.-C
Phase II	$ 175,000		II		- Private operator
Phase III	$ 275,000		III		
16. Stamp Falls					
- Fish Interpretation	$ 10,000				
- Campground Expansion 30 sites	$ 60,000	4,000	III	3 seasonal (.5 m/y)	- Ministry of Lands, Parks and Housing

PROGRAM PROPOSAL	COST	YEARLY O/M COSTS (no salaries)	PRIORITY	EMPLOYMENT	RESPONSIBILITY
UCLUELET DESTINATION AREA					
1. Canadian Princess Resort	$1,250,000	100,000	I, II	16 seasonal (6 m/y)	- Private operator
2. MacMillan Island Fisheries Exhibit	$ 650,000 plus boat	4,000	I	12 seasonal (3 m/y)	- Village of Ucluelet - Private operator
3. Ucluelet/Pacific Rim Recreation Vehicle Resort Campground	$ 375,000	35,000	I	12 seasonal (4 m/y)	- Private operator
4. Davison Plaza Upgrading	$ 150,000	5,000	II	3 temporary/seasonal (1 m/y)	- Private operator
5. Peninsula Avenue Streetscape	$ 250,000	3,000	I	6 temporary (3 m/y)	- Village of Ucluelet
6. Boat Cruise/Charters	$ 150,000	15,000	III	4 seasonal (1 m/y)	- private operator
7. Logging tours Fishplant tours	$ 5,000	2,000 1,000	II	3 seasonal (1 m/y)	- Village of Ucluelet - Private operator
8. Community supper events	$ 2,000	N/A	I	3 seasonal (1 m/y)	- Club/association
9. Motel Expansion 30 units upgrading	$ 800,000	N/A	III	4 seasonal (1 m/y)	- Private operator

ALBERNI- CLAYOQUOT REGIONAL TOURISM STRATEGY

DEVELOPMENT PROGRAM AND PROPOSAL

PROGRAM PROPOSAL	COST	YEARLY O/M COSTS (no salaries)	PRIORITY	EMPLOYMENT	RESPONSIBILITY
TOFINO DESTINATION AREA					
1. Fishermans Village Complex	$1,600,000	25,000	I	1 permanent 12 seasonal (7 m/y)	- District Municipality of Tofino - Private operator
2. Underwater Marine Exhibit	$ 750,000	20,000	III	4 seasonal (2 m/y)	- District Municipality of Tofino - Private operator
3. Native Cultural Center/Museum	$ 650,000- 1.5 million	15,000	I	2 permanent 6 seasonal (4 m/y)	- Clayoquot Band Council
4. Cox Bay Destination Resort and Campground	$2,800,000	155,000	I	6 permanent 6 seasonal (9 m/y)	- Private operator
5. Destination Resort Chestermans/McKenzie's Beach	$2,500,000	160,000	II	5 permanent	- Private operator
6. Tin Wis Cultural Resort Accommodation (50 units)	$1,650,000	45,000	I	9 seasonal(4.5 m/y)	- Clayoquot Band Council
7. Meares Island Exhibit/Tour	$ 50,000	1,000	II	2 seasonal (1 m/y)	- District Municipality of Tofino
8. General Motel Upgrading	$ 110,000	1,000	II	5 part time (m/y)	- Regional Tourism Association
9. Tofino Provincial Craft Festival	$ 10,000	10,000	I	2 seasonal (.5 m/y)	- District Municipality of Tofino

PROGRAM PROPOSAL	COST	YEARLY O/M COSTS (no salaries)	PRIORITY	EMPLOYMENT	RESPONSIBILITY
10. Pacific Rim Golf Course	$ 500,000	8,000	II	8 seasonal (5 m/y)	- Long Beach Recreation Cooperative
11. Community Suppers	$ 2,000	N/A	I	3 seasonal (1 m/y)	- Clubs/association
PACIFIC RIM NATIONAL PARK					
1. Pacific Rim National Park Campground Expansion (400 sites)	$2,500,000	35,000	II III	16 seasonal (8 m/y)	- Parks Canada

PROGRAM PROPOSAL	COST	YEARLY O/M COSTS (no salaries)	PRIORITY	EMPLOYMENT	RESPONSIBILITY
BAMFIELD DESTINATION AREA					
1. Bamfield Boardwalk	$ 450,000	2,500	II	5 seasonal (2 m/y)	- Ministry of Transportation Highways and Communications - R.D.A.-C
2. Bamfield Campground	$1,100,000 to $1,400,000	20,000	I	6 seasonal (2 m/y)	- R.D.A.-C - Ministry of Lands, Parks and Housing
3. Boat Cruise	$ 75,000	8,000	II	3 seasonal (1.5 m/y)	- Private operator
4. Bamfield Marina	$ 115,000	6,000	I	4 seasonal (2 m/y)	- Private operator
5. Bamfield Area Trails Improvement	$ 125,000	2,000	II III	4 part time (1 m/y)	- R.D.A.-C
6. Fishing Resort	$ 750,000	12,000	III	6 seasonal (3 m/y)	- Private operator
7. Alternative Energy Display	$ 45,000	2,000	III	3 part time (.5 m/y)	- B.C. Hydro
8. Cottage Rental Development (15 units)	$ 300,000	1,000	II	6 part time (2 m/y)	- Private operator
9. Visitor Services	$ 10,000				

PROGRAM PROPOSAL	COST	YEARLY O/M COSTS (no salaries)	PRIORITY	EMPLOYMENT	RESPONSIBILITY
REGIONAL SERVICES					
1. Pacific Rim Regional Tourism Association	$ 65,000 including salary		I	1 permanent 1 part time (1.5 m/y)	- Economic Development Commission - RDA-C
2. Regional Promotion Brochure	$ 25,000		I	2 part time (4 mos.)	- Regional Tourism Association
- destination area sections	$ 35,000		I		
- expo '86 blitz	$ 10,000		I		
3. Regional Tourism Information Center					
Phase I renovation	$ 50,000		I	3 seasonal	- Regional Tourism Association
Phase II construction	$ 375,000	8,000	II	4 seasonal (2 m/y)	
4. Manpower Training and Resource Manual	$ 50,000 to $ 60,000	N/A	II	1 m/y	Regional Tourism Association
5. Regional Market Research					
- First year	$ 60,000	N/A	I	4 part time	- Regional Tourism Association
- Subsequent years	$ 20,000	N/A		2 part time (2 m/y)	
6. Regional Signage	$ 90,000	2,000	I	6 part time (2 m/y)	- Ministry of Transportation - Regional Tourism Association
7. Regional Theatre	$ 10,000	4,000 to 6,000	II	6 part time (1 m/y)	- Regional Tourism Association - Port Alberni Theatrical Society

PROGRAM PROPOSAL	COST	YEARLY O/M COSTS (no salaries)	PRIORITY	EMPLOYMENT	RESPONSIBILITY
8. Receptive Tour Operation Initiation	$ 4,000	1,000	I	1 part time (.5 m/y)	- Regional Tourism Association
9. Community Host Program	$ 10,000	1,500	III	4 seasonal (1 m/y)	- Regional Tourism Association
10. Toquart Bay Regional Campground	$ 175,000	20,000	III	3 seasonal (1.5 m/y)	- B.C. Ministry of Forests
11. Airport Upgrading					
- Tofino	$ 75,000	N/A	I	.5 m/y	- Transport Canada
- Port Alberni	N/A	N/A	III	N/A	- City of Port Alberni - RDA-C
12. Bed and Breakfast Program	$ 2,000	500	II	N/A	- Regional Tourism Association
13. Logging Road Maps	$ 10,000	N/A	II	N/A	- B.C. Ministry of Forests

c) Responsibility

Only the principal groups involved in promoting a project are identified. If funding agencies are involved, they have not been included.

5.2 DEVELOPMENT SCHEDULE

The following Figure 5-3 outlines the development schedule over the next ten years. It indicates a proposal for the timing for both planning and development phases of the strategy.

Much of the proposed development takes place in the first five years and reflects the potential growth curve. As well, a special effort has been suggested in order to meet the expected tourism increase generated by Expo 86.

While this schedule attempts to reflect existing and proposed market conditions, development will be significantly affected by many unknown and unpredictable factors such as:

- potential for local authorities to stimulate investor interest;
- availability of government funding;
- formation of the Pacific Rim Tourism Association and the launching of a subsequent Promotion Campaign;
- availability of qualified manpower to construct and operate the various facilities.

These factors have been accounted for and have been built into the time lines.

It should be noted, that while start times may vary on selected projects, the order of their development is what is critical.

Development Schedule

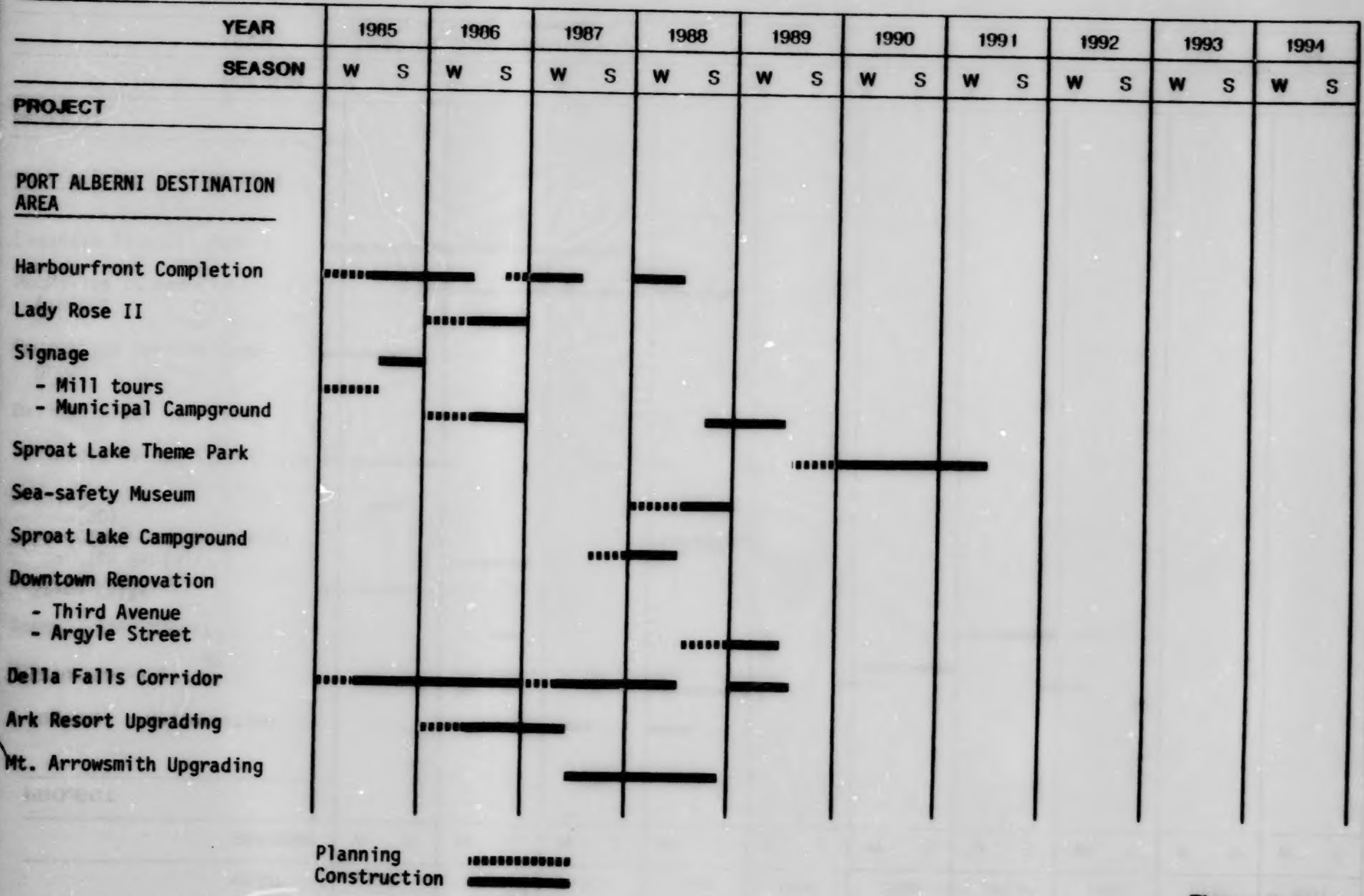
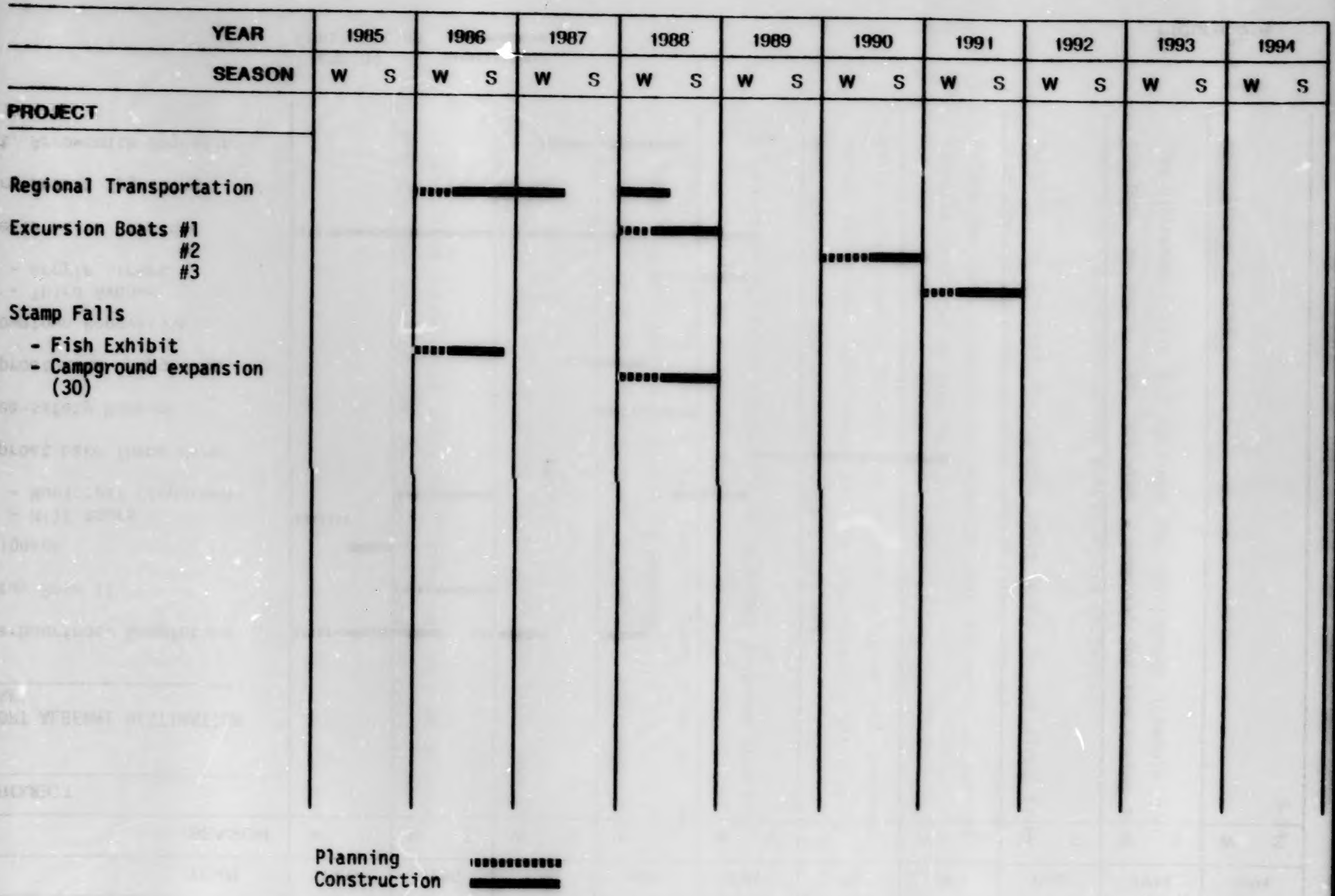


Figure 5-4


YEAR
SEASON
PROJECT
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1987
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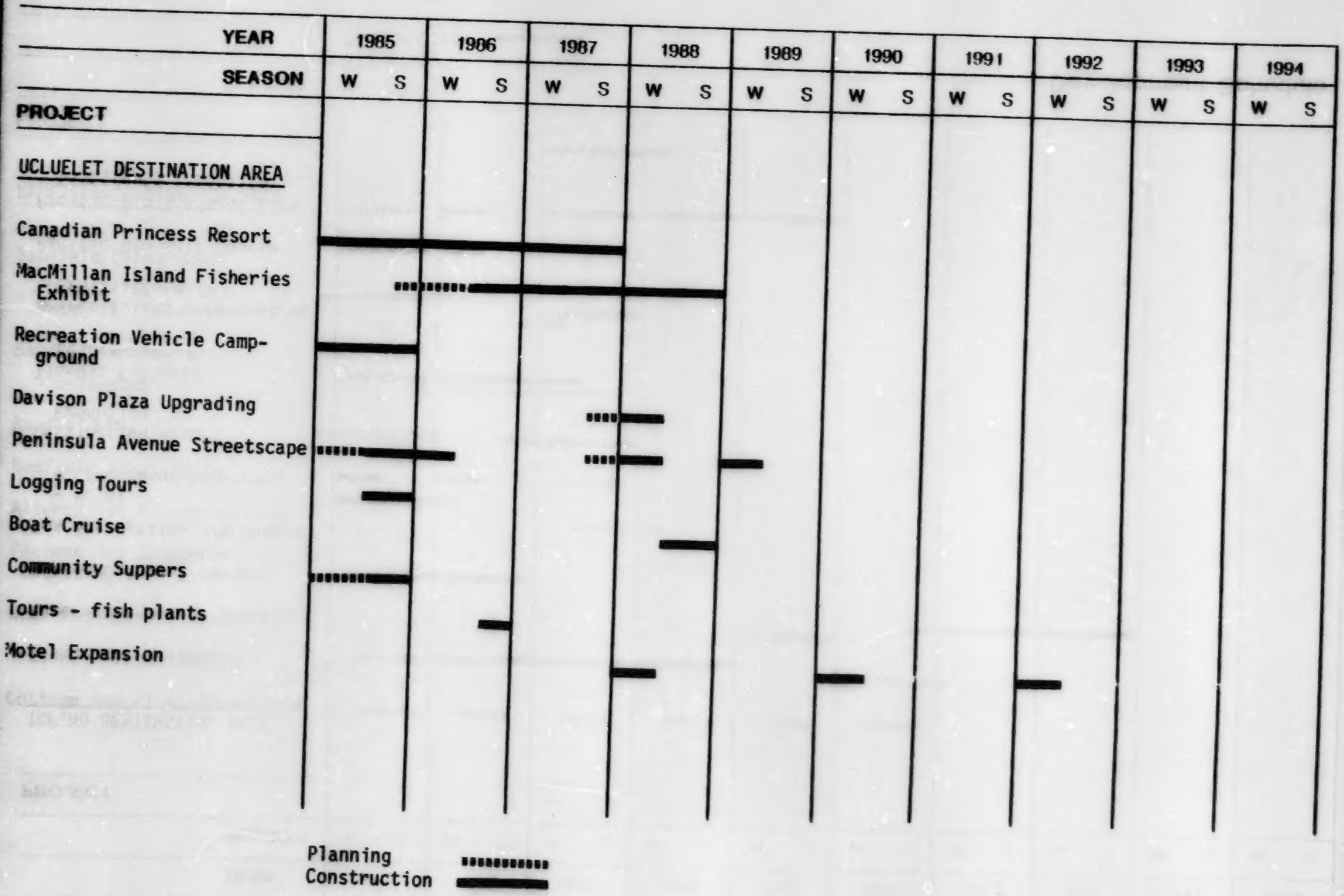
Regional Transportation
Excursion Boats #1
#2
#3
Stamp Falls
- Fish Exhibit
- Campground expansion (30)
Planning
Construction

YEAR
SEASON
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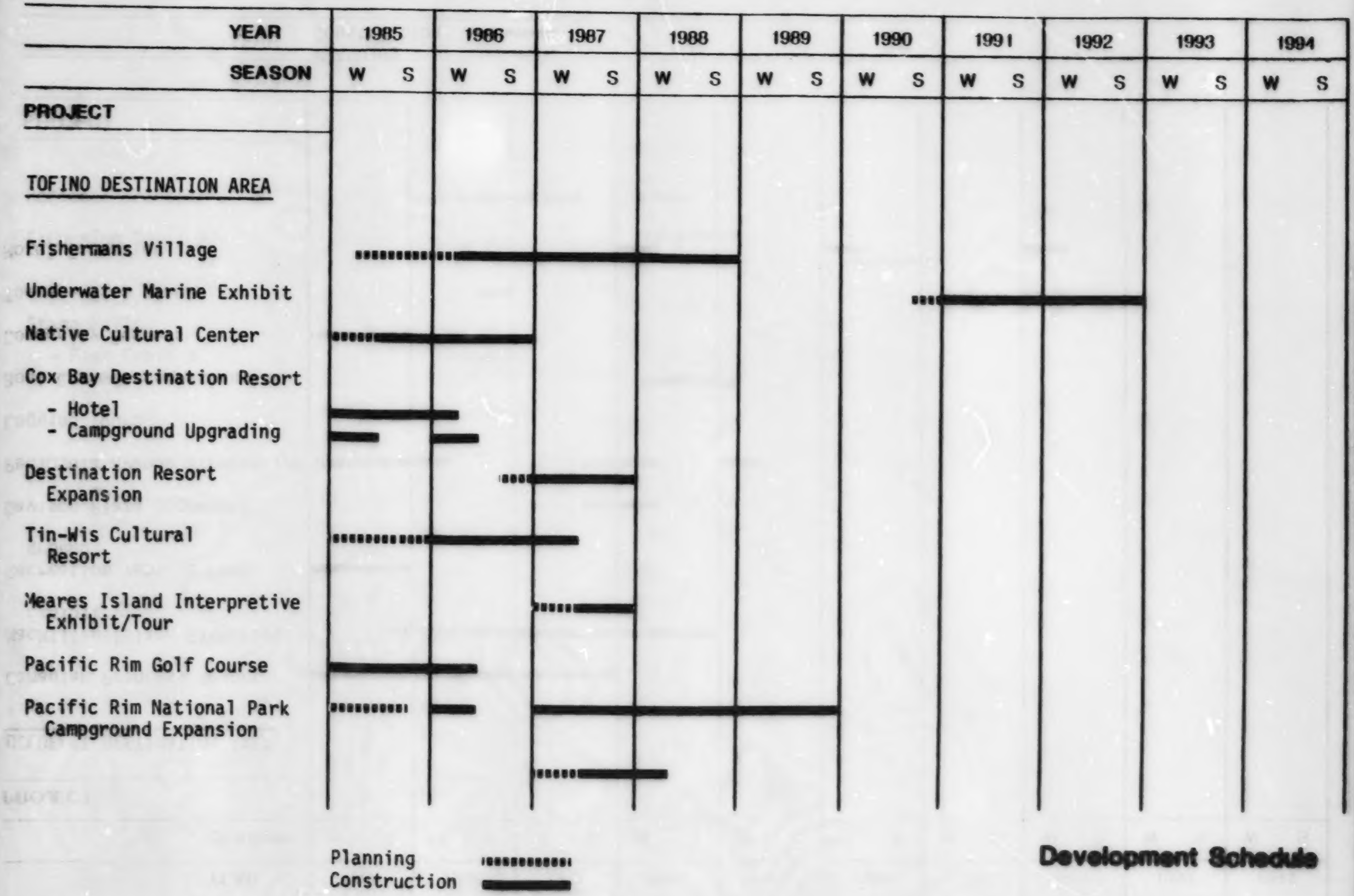
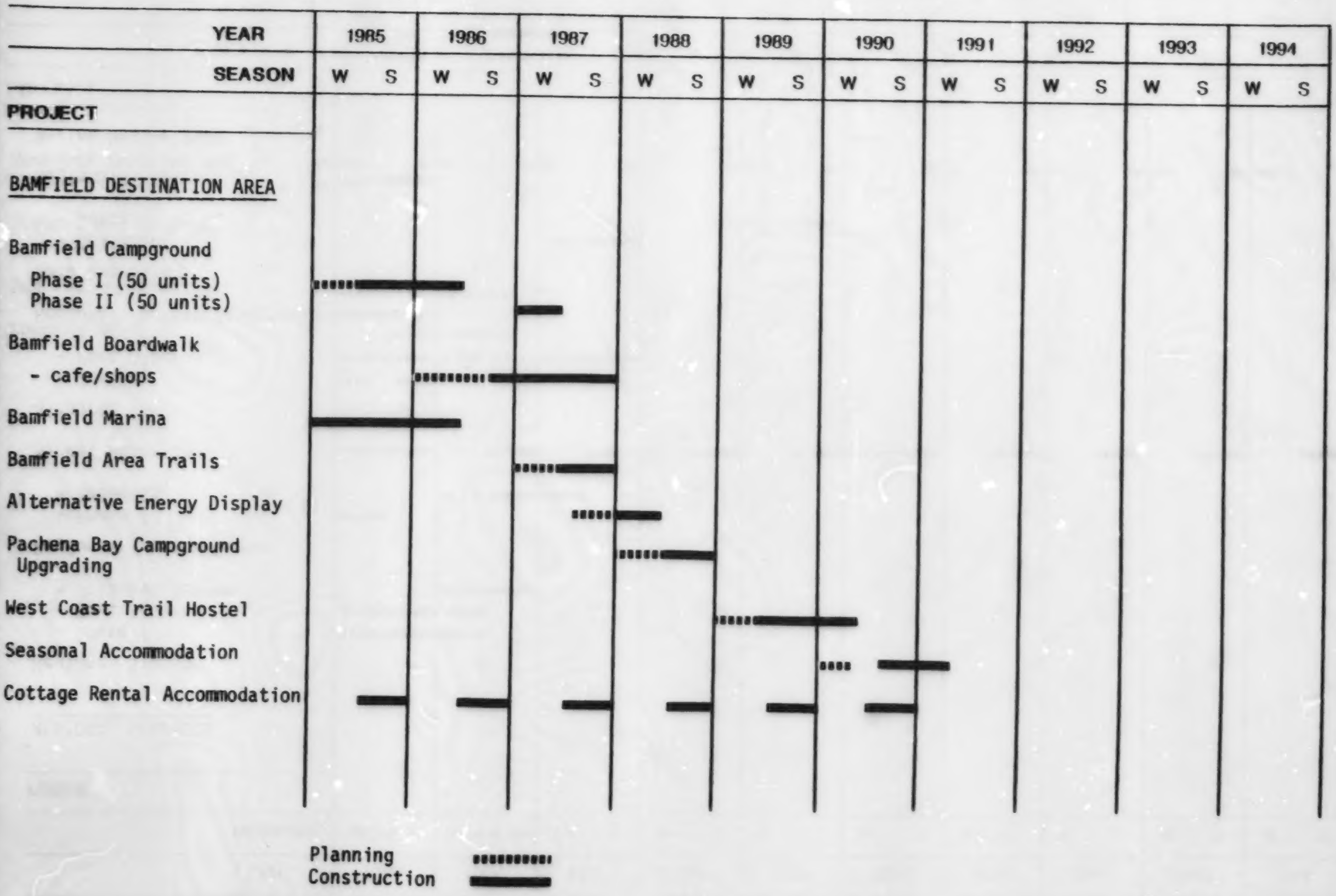
UCLUELET DESTINATION AREA
Canadian Princess Resort
MacMillan Island Fisheries Exhibit
Recreation Vehicle Campground
Davison Plaza Upgrading
Peninsula Avenue Streetscape
Logging Tours
Boat Cruise
Community Suppers
Tours - fish plants
Motel Expansion
Planning
Construction



Development Schedule


YEAR
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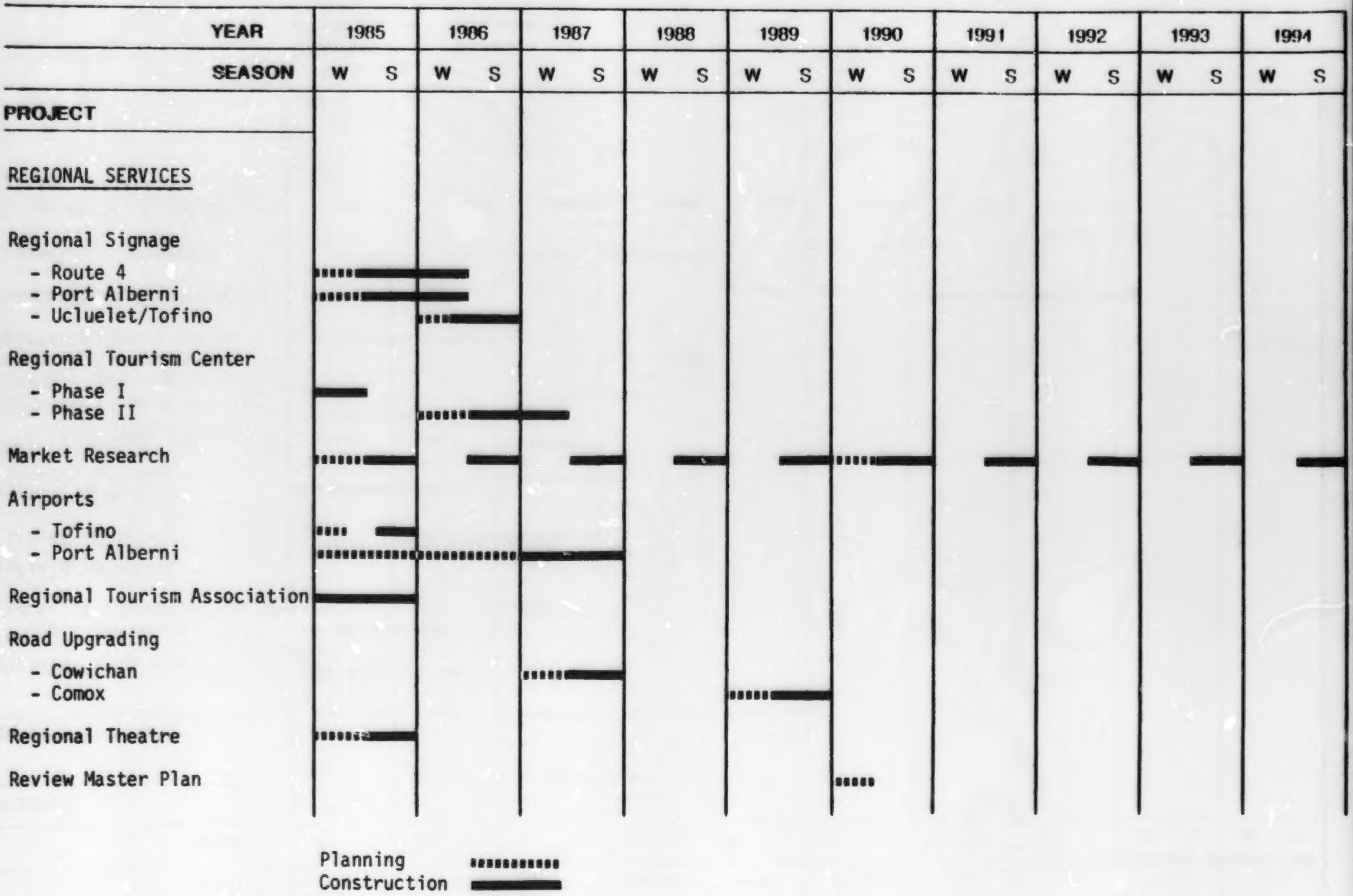
SEASON
W
S
PROJECT
BAMFIELD DESTINATION AREA
Bamfield Campground
Phase I (50 units)
Phase II (50 units)
Bamfield Boardwalk
- cafe/shops
Bamfield Marina
Bamfield Area Trails
Alternative Energy Display
Pachena Bay Campground Upgrading
West Coast Trail Hostel
Seasonal Accommodation
Cottage Rental Accommodation
Planning
Construction


YEAR
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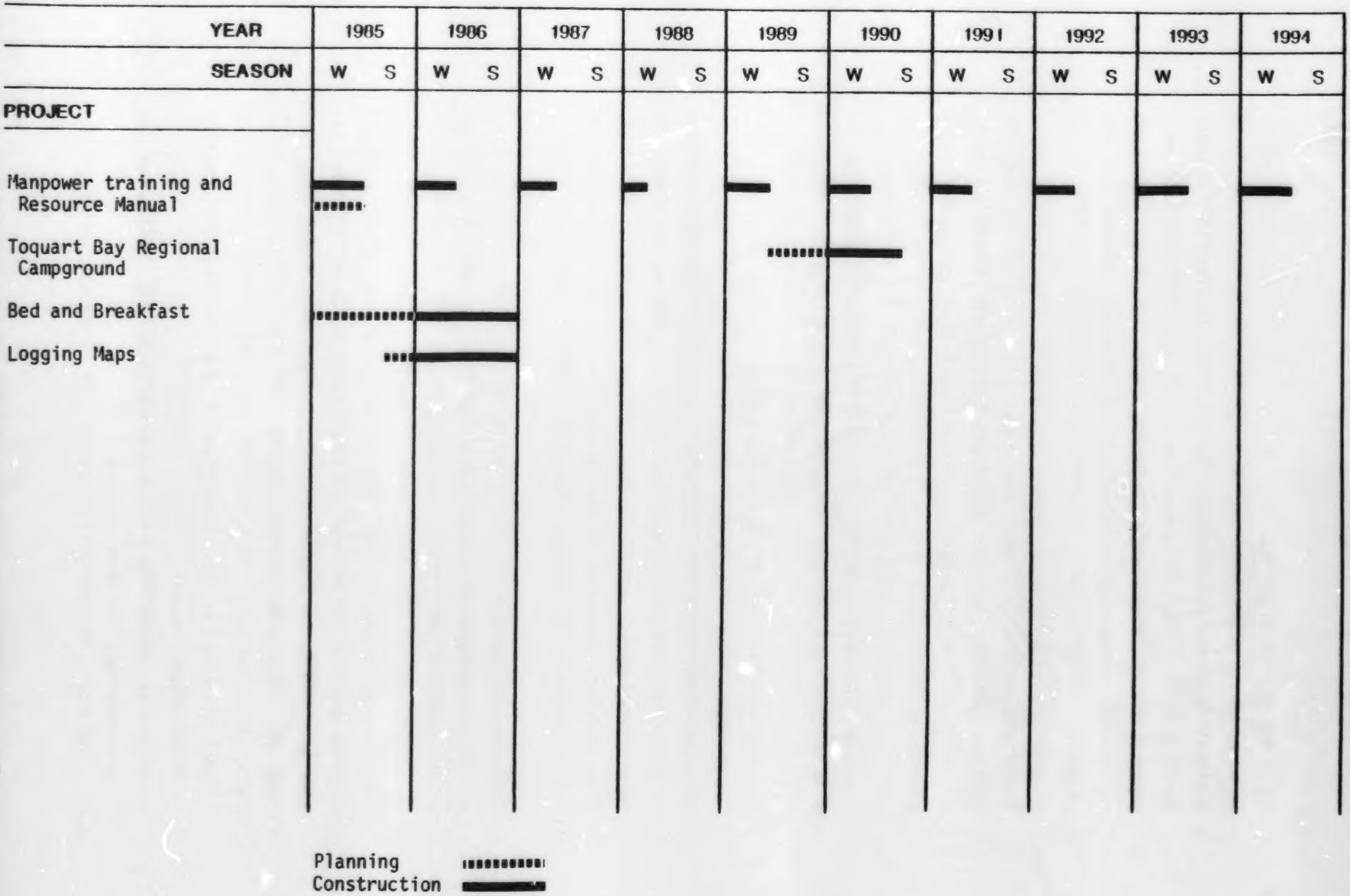
SEASON
W
S
PROJECT
REGIONAL SERVICES
Regional Signage
- Route 4
- Port Alberni
- Ucluelet/Tofino
Regional Tourism Center
- Phase I
- Phase II
Market Research
Airports
- Tofino
- Port Alberni
Regional Tourism Association
Road Upgrading
- Cowichan
- Comox
Regional Theatre
Review Master Plan
Planning
Construction


YEAR
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SEASON
W
S
PROJECT
Manpower training and Resource Manual
Toquart Bay Regional Campground
Bed and Breakfast
Logging Maps
Planning
Construction

5.3 ROLES AND RESPONSIBILITIES

Regional tourism development requires the involvement of many pariticipants. The Background/Technical Report identified more than thirty groups of suppliers, agencies and government departments presently involved in tourism development in the region.

Tourism growth will create the demand for more actors and the strategy actually outlines the participation for new groups such as the Pacific Rim Regional Tourism Association and conservation committees, etc.

There will be certain key players that have both a leadership and a facilities role to play. They include:

1. Regional District of Alberni-Clayoquot

As a principal actor in the Alberni-Clayoquot Regional Tourism Strategy its members and its Regional Parks and Tourism Committee have shown a keen interest in tourism development. They have also been involved over the past few years with the development of tourism attractions and are presently concerned with:

- the development of the Della Falls Trail System;
- the upgrading of Mt. Arrowsmith; and
- the proposal for a campground in Bamfield

They should maintain this profile of providing regional-based tourism services to unorganized areas and assisting in coordinating activities in organized areas. Additional roles they may play with respect to tourism include:

- participating in the formation of the sub-Regional Tourism Association;
- providing leadership in acquiring planning assistance on proposed facility developments;

- encouraging the Pacific Rim Tourism Association to gain intercommunity collaboration in the organization of attractions and special events;
- providing technical support to the private sector in securing financial and other forms of assistance; and
- consider changing its name to the "Pacific Rim Regional District" as a gesture of support for tourism development.

2. Economic Development Commission

The Commission has taken an active role in tourism development as a member of the Tourism Development Strategy Steering Committee as well as forming its own Tourism Committee. The role of this committee should be maintained until the new Pacific Rim Regional Tourism Association is in place.

The Commission will have the responsibility of establishing the tourism association as part of their existing mandate to stimulate industrial growth, economic development and employment opportunities.

They will also be responsible for:

- insuring that tourism as an important regional economic activity is understood and appreciated throughout the region;
- assessing funding sources for facility development;
- maintaining a close involvement with the implementation of the strategy;
- providing advisory services to the Regional Tourism Association on marketing and promotion, development etc.: and
- assisting in the transfer of labour from primary to the tertiary sector through the provision of hospitality training programs.

3. Chambers of Commerce

The three Chambers are already involved in tourism. Their involvement will continue as a member of the Regional Tourism Association.

They will also be involved in:

- promoting the implementation strategy;
- motivating municipal councils to actively pursue attraction development, streetscaping, etc.
- promotion of their individual communities;
- minimizing conflict between tourism and other industries; and
- encouraging inter-community cooperation.

4. Municipal Government

Because the strategy is based on the clustering of attractions and services around communities, the municipal councils will play a very important role in realizing the implementation objectives of their respective Destination Area.

The City of Port Alberni Council has already shown a remarkable commitment to the development of tourism. Their involvement in Harbour Quay should be considered as a model for political support behind what will eventually be one of the most important tourism facilities in the region. It is anticipated that this motivation will continue with both the on-going development of Harbour Quay as well as the realization of such projects as the municipal Campground, the Regional Transportation System and the Downtown Streetscaping.

Both Ucluelet and Tofino must face the formidable challenge of generating the funds for both their two major attractions, the Fisheries Exhibit and the Fishermans Village, as well as providing the necessary leadership to assure the organization of special events, community suppers and festivals.

5. Native Band Councils and the Nuu-chah-nulth Tribal Council

There are only two projects proposed for the native community; however, their scope and potential implications to both the native councils and the regional tourism strategy are very important.

Considerable energy will have to be spent in both the development as well as the management of the proposed seasonal accommodation facility. As well, the eventual construction of a 13 Band Museum implies a major development project for the Nuul-chah-nulth Tribal Council.

6. Travel Association of Vancouver Island

This association will be instrumental in assisting in the formation of the Pacific Rim Tourism Association. Their past experience as well as insights gained with working with other tourism associations will be important during the initial years of the association.

They will also be helpful on such regional projects as:

- regional market research
- developing package tours
- identifying market shifts to Vancouver Island
- assisting with component mix on attraction development
- implementing the promotion plan.
- securing public sector funding for local incentive.

7. Federal/Provincial Governments

The roles and responsibilities of the federal and provincial ministries have been outlined in the Background/Technical Report.

5.3.1 Implementation Mechanisms

The ability of a region to implement a tourism strategy is largely dependant upon the capacity of the various actors (community leaders, politicians, civil servants, industry representatives, etc.) to commit time and energy to supporting the objectives of the plan and following the development schedule. Successful tourism regions throughout the country are characterized by a cooperative and organized industry enthusiastic and supportive political and government leaders and a dynamic community.

The Alberni-Clayoquot Region has already demonstrated the necessary enthusiasm by:

- accepting the Pacific Rim National Park as a national tourism destination;
- creating such first-class tourism developments such as Harbour Quay; and
- supporting the preparation of Long Range Tourism Development Strategy.

That same dynamics must now be translated into the implementation of the Master Strategy.

Different steps are involved in realizing the various components of the strategy. Some have been outlined in the presentation of the development opportunities. They are summarized here by:

- private projects;
- government supported projects; and
- community events projects.

5.3.1.1 Private Projects

There are several sources of capital that may be used to fund private projects. For the purpose of the study region, it is assumed that they will come from the owner, outside investment capital, lending institutions and government support funding. The lending institutions have proven particularly reluctant to provide money for tourism projects and even more reticent about financing projects on the west coast of Vancouver Island. Also, while there are a number of investors interested in tourism development, many of them, particularly offshore dollars (Japan, Hong Kong) tend to favor the more secure properties in the developed areas such as the Lower Mainland. However, there are opportunities for combinations of owner capital/equity, outside investors and possibly government funding.

The steps to proceed with these types of projects include:

1. acquiring a certain amount of equity (e.g. land);
2. identifying possible investors;
3. preparing a feasibility analysis and Master Plan; and
4. securing necessary funding from the various sources.

5.3.1.2 Government Supported Projects

There are certain projects - particularly attractions, that require government funding in order to be economically viable, the return on investment for the government in this case is in the form of tax revenue and overall economic spin-offs generated by the project.

In all cases however, they require active public support with project initiation usually coming from the community or the politicians. Harbour Quay has already set an example of community collaboration in tourism attraction development.

The steps for such projects as for example, the MacMillan Fisheries Exhibit include:

1. organizing a community body usually consisting of local politicians, involved citizens, members of the public sector including senior governments;

2. preparation of a plan of action regarding each individual project;

3. making representation to senior levels of government for the purpose of identifying development requirements (e.g. feasibility study, cost sharing arrangements, etc.).

4. preparation of development package to various government agencies and private companies potentially involved in the project.

Many communities across the country have been able to acquire major tourism attractions involving varying degrees of government involvement. The constant factors seem to be:

- quality organization;
- motivation and public support; and
- persistance and realistic timing.

5.3.1.3 Community Projects

Tourism development provides ample opportunity for a variety of community-based projects which may involve the existing community, a network of volunteers and leisure providers (service groups, cultural societies, etc.).

Because of the variety of special events, staged attractions and festivals that may be provided by the citizens of Alberni- Clayoquot, it is only necessary to mobilize the citizens around some of the opportunities outlined in the strategy (e.g. Pacific Rim Pagent, Regional Theatre, etc.).

The catalyst for this or a similar event is usually the Pacific Rim Tourism Association working in collaboration with local municipal councils and community groups.

Since the tourism association may take some time to establish it initially will be the responsibility of either the community leaders or the elected representatives at the local level.

5.3.1.4 The Pacific Rim Regional Tourism Association

The role of this association cannot be underestimated. In fact, behind most successful tourism regions, destinations or communities can be found an organized dynamic association under the guidance of a skilled and enthusiastic director.

The implementation of this association requires the absolute support of senior and local government as well as the complete commitment of the principal benefactors -- the travel industry in Alberni-Clayoquot.

5.4 THE PROMOTIONAL PLAN

Promotion is one of the four famous "P's" of marketing (product, place, price, promotion). This strategy would also add "people programs and packaging".

Most proposals are the type that encourage "people participation", both as guests (tourists) and hosts (local citizens).

The types of programs available to the travellers will be expressed in the promotional campaign.

As well, packaged tours will be promoted for both their physical product as well as the programs.

To date there has only been one facility that has taken a major marketing orientation - the Canadian Princess. However, under the guidance of the Pacific Rim Regional Tourism Association, it is anticipated that each operator will work collaboratively to promote the region.

This section will deal with the promotion plan to be carried out by the Pacific Rim Regional Tourism Association, however many of the steps could be applied to the marketing of individual attractions or services.

5.4.1 The Promotion Mix

A successful promotion campaign is based on a well developed promotion mix. The promotion mix to be used by the Pacific Rim Regional Tourism Association includes:

- advertising;
- sales promotion; and
- public relations.

5.4.1.1 Advertising

Advertising can be an effective promotional tool for this region, particularly because its primary market area is so well covered by the various advertising vehicles.

- Objectives

The advertising objectives of the Pacific Rim Regional Tourism Association should be to:

- introduce new products as the master strategy is being implemented;
- promote shoulder season/off-season demand;
- introduce this relatively unknown travel product i.e. create demand and then continually reinforce the regional image by repeat advertising; and
- use different media to expose specific market segments such as outdoor recreation enthusiasts, seniors, empty-nesters, etc.

Available advertising vehicles include:

- Newspapers

The primary market has a relatively high urban population with a wide variety of newspapers. They will be used to:

- advertise and publish articles in travel sections;
- provide press releases on the opening of new facilties.
- access specialty magazines and travel magazines

They will be used to reach special target markets like fishermen, recreation vehicle owners, hikers and campers, boat owners, etc. (Examples are B.C. Outdoors, Travel Holiday, etc.).

- Travel Trade Publications

Once package tours have been set up they can be promoted in trade magazines such as Agent West Weekly, as can certain attractions and destination resorts.

- Direct Mail

The Regional Tourism Association can work in collaboration with operators to send out regular information on the region to:

- former visitors
- outdoor recreation club members
- fishing association members
- etc.

Direct mail can take the form of brochures, newspaper releases, personal letters (i.e. from a mayor, tourism association executive), pamphlets, souvenir items (salmon pins, native craft) etc.

- Billboards

A well designed billboard advertising the Pacific Rim Tourism Region, in a selected area of Vancouver would do much to create an awareness.

- Radio

Special events, new attractions, etc. could be advertised on the radio stations of the Lower Mainland. This would be a cost effective way of introducing the region to the primary market in the first years of the promotion plan.

The actual promotion mix will change each year as new products, requiring different media become available. For instance, with the opening of a new motel or attraction, there would be a heavier emphasis on newspapers and perhaps billboards, while new packages would increase advertising in trade journals, specialty magazines as well as newspapers.

- Promotional Brochure

The promotional brochure will be one of the main tools used to sell the Pacific Rim Tourism Region.

The format of the brochure has already been discussed in Section 3, but what is essential to the promotion plan is deciding on how it will be distributed.

A number of distribution channels exist such as:

- tourist information centers throughout B.C., Seattle, the Okanagan Valley, Banff and Jasper;
- the B.C. Ferries to Vancouver Island;
- hotel/motels in selected Lower Mainland locations;
- clubs and associations in the target market segments;
- Vancouver, Alberta, Seattle-Tacoma airports; and
- mail-outs to selected individuals such as tour operators, wholesalers, travel agents.

5.4.1.2 Sales Promotion

- Sales programs

Various programs can be designed to sell the Pacific Rim tourism region to both the travel trade and the consumer. Such programs should intend to both introduce the product, as well as keep it in the minds of the travellers. Such programs may include:

- contests, involving for instance, the identification of west coast whales or naming the native tribes of the area, can be run - native craft, smoked salmon, etc., could be used as prizes;

- Regional exhibits (possibly using material from the many static displays) can be set up in:

  - shopping centers - Vancouver, Seattle
  - Robson Square
  - certain car rental outlets
  - bus terminals

- consumer travel shows such as the "Travel Market Place", "Rendez-Vous Canada", the "All Pacific Travel Trade Shows", or the new annual "Canada Day" (Seattle) Trade Show.

- Direct Selling

The executive director of the Pacific Rim Regional Tourism Association would be responsible for direct selling. This approach would be used to contact:

- wholesalers
- tour operators
- selected travel agents
- bus lines
- selected tourism information center personnel
- companies interested in the region (e.g. incentive travel, conferences or seminars).

Direct sales to the travel trade in particular will have a major influence on the development of tourism in the region and the ability of the executive director to convince the travel intermediaries of the benefits of the Pacific Rim product that will greatly influence travel growth.

Selling techniques that could be used include:

- video or slide presentations of the region or of particular travel products
- familiarization tours of the region in collaboration with local suppliers and Tourism B.C.
- cold sale calls to travel operator staff and management
- travel
- advertising tie-ins with specific operators such as Maverick Coachlines, or Air B.C.

- Travel Trade Shows

The Travel Trade Shows such as "Tourcan", the "Travel Market Place Trade Show Series", "Rendezvous Canada" or the "Canadian Supplier's Trade Show", are becoming increasingly popular for selling regional travel products. There were more than a dozen within the primary market last year represented at these and related travel shows.

These events enable both the regional operators as well as the Pacific Rim Regional Tourism Association to expose their products to the travel trade. Therefore the region should be well represented at shows by the various suppliers.

5 .1.3 Public Relations

There are a number of public relation approaches that can be used to create additional publicity for the region.

- Press Releases

They are usually used around a special event such as the opening of an attraction or the announcement of a special event. In fact most newsworthy events can get printed especially if it is written in such a way as to appeal to the specific readership.

The executive director should be available to be on radio or television to discuss tourism in the context of community development, hospitality, product development, etc.

- Receptions and Presentations

The Pacific Rim Tourism Association should organize receptions and presentations for special groups, travel operators and travel writers as well as film makers, etc.

5.5 FINANCIAL ASSISTANCE AND FUNDING

5.5.1 Financial Assistance

The Pacific Rim Tourism Region will only realize its full tourism potential, as outlined in the Master Development Strategy, if there is government financial assistance on certain projects. Because of the limited amount of equity available in the region, for this type of industry, the governments must serve as a catalyst to stimulate and attract venture capital.

There are a variety of formulas available for government pariticipation, including:

- low interest loans;
- equity participation
- capital cost grants;
- guaranteed loans; and
- fiscal incentives, etc.

Monies can be made available for:

- capital (upgrading, expansion, new projects);
- operating capital; and
- promotion, etc.

Forgiveable loans should be considered when proposed programs or projects are new and complementary (as opposed to competitive) to the tourism industry. These programs or projects would have, as their primary objective, to stimulate the business that supports the existing tourism sector. (For example, the Tourist Association or attractions which generate new demand).

The appropriate role for the Regional District and the Economic Development Commission is to help in the creation of an attractive investment climate, by increasing its assistance to those attractions which contribute to a positive tourism experience. Businesses will naturally respond to market forces and develop accommodation facilities if the following conditions prevail:

- the investment climate is healthy;
- lenders perceive a reduced risk; and
- non-economic competitive facilities are not encouraged to exist beyond their useful lifespan (e.g. ma-pa motel properties).

We recommend that the funding of upgrading and renovation should be administered on the basis of loans with a 5-year interest-free and delayed repayment period. The loans could have a 10-year term and a 25-year amortization period at interest rates prevailing upon commencement of repayment.

This process would have the initial impact of a grant, but would ensure a more realistic appraisal of future business prospects by considering the need for ultimate repayment.

Greater communication between the various funding agencies would enable more efficient financial and stimulation funding on projects. The master plan should be used as a point of reference for identifying priority projects requiring financial support.

- Funding Criteria

The approach recommended to determine which applications for funds should be considered and possibly accepted, is similar to the methods used by private lenders to assess a loan application. Essentially, the criteria fall within the following categories:

- Management experience;
- Financial position of the business;
- Future business prospects;
- Current physical condition to the assets.

Supplementary considerations must also include:

- the effects on competition (some worthy competitors might suffer depending upon the extent of the assistance to the applicant);
- the training of employed personnel;
- the willingness of the operator to utilize satisfactory business management procedures; and
- the willingness of the operator to investigate market requirements.

5.5.2 Funding Sources

There are a number of capital and technical assistance programs available from the provincial and federal governments, which support tourism development.

5.5.2.1 Provincial Programs

Ministry of Industry and Small Business Development

- Small Business Assistance Program

The program provides counselling to small businesses in the form of management and organizational analysis and assistance.

- British Columbia Development Corporation
  Financing Assistance Program

The program provides assistance in the form of term loans or loan guarantees for land acquisition and construction capital.

5.5.2.2 Federal Programs

- Departments of Industry Trade and Commerce and Regional Economic Expansion (ITC/DRIE)

- Industrial and Regional Development Program (IRDP) and Tourism Canada

IRDP applies to all phases of corporate product life cycle - from industrial infrastructure and innovation to facility development, upgrading, expansion and marketing. The program can provide up to 75% of market reseach costs and 60% of eligible costs for construction of new tourism facilties - subject to program guidelines and elegibility criteria. The tourism program for Pacific Rim is administered by the regional offices of Tourism Canada in Victoria.

- Federal Business Development Bank

- Financial Services

Financial assistance in the form of loans, loan guarantees, equity financing or a combination of these is available to business.

- Management Seminars

One day management seminars are conducted.

- Counselling Assistance to Small Enterprise

This service provides retired business persons to act as consultants to various small business.

5.5.2.3 Federal/Provincial Programs

TIDSA terminated on March 31, 1984 and there remains only one sub-agreement that has an impact on tourism.

- Agriculture and Rural subsidiary Agreement - Special ARDA the program provides assistance to status Indians in rural areas in order to improve their economic situation. Two programs are available:

  - Assistance to Residents of Indian Ancestory
  - Assistance to Remote Rural Areas

CEIC appears to have a significant role to play in tourism development lately with millions of dollars being allocated to tourism/tourism related projects.

5.6 CONCLUSION

Alberni-Clayoquot is potentially one of the most popular destination regions in British Columbia. Its wealth of natural attractions combine with proximity to a large urban and mobile primary market (Vancouver-Lower Mainland) to provide the basic ingredients for a significant tourism industry based on high visitation, and sustained growth.

Nevertheless visitation is relatively low, man-made attractions are few, marketing is inadequate and organization at the regional level is non existant.

This regional tourism strategy, therefore, systematically and sequentially outlines those steps necessary for the region to meet its full tourism potential. It outlines the attractions services, manpower and marketing requirements that are necessary to increase overall tourist flow, as well as successfully compete against other existing and emerging destination regions.

The proposed development does not have to be rapid and like most successful tourism projects, must evolve with new markets imporvement of management skills and increased promotion.

Most importantly the strategy suggests the specific steps and responsibilities necessary for implementation. It emphatically states that tourism will only become a major economic generator if it has the collective support of the politicians, tourism industry, bureaucrats and community. The latter have given their approval to the development of a healthy travel industry. It is now the responsibility of the community leaders to embark on an action plan to fulfill the objectives of the plan. For instance, a Pacific Rim Tourism Association MUST be formed immediately. The urgency of this action cannot be underestimated.

As other competing regions are organizing, and with the promise of thousands of additional visitors to the island in 1986, an immediate commitment has to be made by local governments and the travel industry to support and develop tourism. A major effort is required in the area of marketing (research, advertising, tradeshows) attraction and services development and manpower training. If these actions are not taken, Alberni-Clayoquot will simply continue to miss further opportunities in the growth of what could eventually become its most significant economic sector. While forestry and fishing will continue to be important revenue earners they are nevertheless two industries in decline, not just in British Columbia but throughout Canada. Understandably it will not provide the high salaries and standard of living of the past, but tourism is labour intensive and can contribute to job creation and improvement in the quality of life. The economic benefits that have been conservatively estimated in this report are impressive and indicate 100 permanent full time positions, approximately 3000 jobs and nearly $34 million in poles (transactions). But achieving these realistic economic goals will not be easy.

Government funds are difficult to acquire and investor capital for tourism projects are limited but the region *does* have the potential. Only through the collective efforts of all those individuals directly and indirectly involved in tourism, will that potential be realized.

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

APPENDIX I

OPPORTUNITY EVALUATION MATRIX

The value rated matrix has been set up to establish order of magnitude importance to each of the proposed development opportunities.

A plus and minus 1,2,3 numerical value system is used with a plus 3 corresponding to the highest positive impact and a minus 3 representive of the most significant negative impact. Zero (0), of course, suggests no impact.

A value rated system such as this is always subject to scrutiny and question. However, it has been developed based on the best professional judgement of the consultants and accepted by overview by the steering committee.

It has been proposed purposely as a working tool to enable the study team to establish a "first cut" importance of the various projects in terms of their ability to respond to the objectives of the strategy.

OPPORTUNITY EVALUATION MATRIX

ATTRACTIONS/EVENTS

REFERENCE

Ucluelet/Tofino Coastline Clayoquot Sound	Canadian Princess Resort	MacMillan Island - Interpretive Exhibit Ucluelet	Logging Tours - Ucluelet	Fisherman Village - Tofino	Underwater Marine Exhibit - Tofino	Meares Island Development	Native Cultural Museum - Tofino	Craft Festival and Exhibition - Tofino
1. IMPACT ON STRATEGY								
- Extend Shoulder Season	2	3	1	3	3	1	3	1
- Extend Year-Around Tourism	0	1	0	3	3	0	2	0
- Increase Volume	2	3	0	3	2	1	2	2
- All Weather Facility	1	3	0	3	3	0	3	1
2. IMPACT ON ECONOMY								
- Job Creation (Overall)	2	1	0	2	1	1	2	1
- Student Employment	2	2	1	3	1	1	1	2
- Diversify Economy	0	1	0	2	2	0	1	2
- Generate Income	1	1	1	2	1	0	1	3
- Generate Local Taxes	2	1	0	2	1	0	0	2
- Job Training	2	1	0	1	1	1	2	1
3. IMPACT ON REGIONAL TOURISM								
- Integration With Existing Plant	3	2	1	3	3	1	3	3
- Impact On Competition	0	0	0	-1	0	0	0	0
- Response To Markets	2	3	1	3	2	1	2	2
- Clustering Benefits	3	3	0	3	0	0	3	2
- Funding Potential	0	2	0	2	1	1	3	0
4. ENVIRONMENTAL IMPACTS	0	1	1	0	0	2	0	0
5. COMMUNITY IMPACT								
- Impact On Lifestyle	0	0	0	1	0	0	1	2
- Resident Recreation Opport.	0	1	0	2	0	1	1	2
- Economic	1	2	1	2	1	0	1	2
6. PROJECT POTENTIAL								
- Expected Viability	2	0	0	2	1	0	1	2
- Local Investment Opportunities	0	0	1	3	0	0	1	2
- Infrastructure Costs to Communities	0	-1	0	-1	-1	0	-1	0
	25	30	8	43	25	11	32	32

OPPORTUNITY EVALUATION MATRIX

ATTRACTIONS

Alberni Lake Sproat Lake, Kennedy Lake Mount Arrowsmith Great Central Lake/Stamp River Barkley Sound West Coast Trail	Boardwalk Development - Bamfield	Alternative Energy Display-Bamfield	Boat Cruise - Bamfield, Broken Group - Ucluelet	Recycle Church Camp, Pachena Bay	Harbour Quay Development	Mount Arrowsmith Ski Development	Lady Rose II Cruise	Sproat Lake Water Park	Della Falls Trail System
1. IMPACT ON STRATEGY									
- Extend Shoulder Season	1	0	2	1	3	2	2	0	2
- Extend Year-Around Tourism	0	0	0	0	2	3	0	0	0
- Increase Volume	1	1	2	1	3	1	2	1	1
- All Weather Facility	1	1	2	1	3	1	2	0	0
2. IMPACT ON ECONOMY									
- Job Creation (Overall)	0	0	1	1	3	1	0	1	0
- Student Employment	0	1	0	2	2	0	1	1	1
- Diversify Economy	0	0	1	1	3	0	0	0	0
- Generate Income	1	0	1	1	3	1	1	1	1
- Generate Local Taxes	1	0	0	0	3	0	1	1	1
- Job Training	0	1	0	0	1	0	0	0	0
3. IMPACT ON REGIONAL TOURISM									
- Integration With Existing Plant	3	2	3	1	3	2	3	2	2
- Impact On Competition	0	0	0	0	-1	0	0	0	0
- Response To Markets	2	1	3	2	3	0	3	2	2
- Clustering Benefits	3	1	0	1	3	1	2	2	0
- Funding Potential	2	3	1	1	2	1	1	0	2
4. ENVIRONMENTAL IMPACTS	0	2	0	0	0	0	0	0	0
5. COMMUNITY IMPACT									
- Impact On Lifestyle	0	0	0	0	1	0	0	0	0
- Resident Recreation Opport.	1	0	0	0	2	3	0	3	1
- Economic	1	1	0	0	3	1	1	0	0
6. PROJECT POTENTIAL									
- Expected Viability	0	0	2	1	2	1	3	1	0
- Local Investment Opportunities	2	0	3	2	3	0	2	3	1
- Infrastructure Costs to Communities	-1	0	0	0	-3	0	0	-2	0
	18	14	21	16	44	18	24	16	14

OPPORTUNITY EVALUATION MATRIX

ACCOMMODATION

	100 Unit Campground - Bamfield	Upgrade Campground Pachena Bay Indian Reserve #11	Seasonal Accommodation - Pachena Bay	Expand/Organize Campground at Toquart Bay	Expanded Campground (Pacific Rim National Park)	Upgrade Cox Bay Campground	Christie Residence (Seasonal Accommodation) - Tofino	Coastal Destination Resort - Tofino	Nurses Residence Recycle - Tofino	Municipal Campground - Port Alberni
1. IMPACT ON STRATEGY										
- Extend Shoulder Season	2	1	2	1	3	2	3	3	1	2
- Extend Year-Around Tourism	0	0	1	0	0	0	2	3	0	0
- Increase Volume	2	1	1	1	3	2	2	2	0	2
- All Weather Facility	0	0	1	0	0	0	2	2	0	0
2. IMPACT ON ECONOMY										
- Job Creation (Overall)	2	1	2	0	2	1	2	1	0	1
- Student Employment	2	1	1	0	2	2	1	2	2	2
- Diversify Economy	2	2	2	0	1	1	1	1	1	1
- Generate Income	2	2	2	0	1	1	1	1	1	1
- Generate Local Taxes	1	0	1	0	1	1	0	1	1	2
- Job Training	0	0	0	0	0	0	2	1	0	0
3. IMPACT ON REGIONAL TOURISM										
- Integration With Existing Plant	3	3	2	1	3	3	2	3	1	3
- Impact On Competition	0	0	0	0	-1	0	0	0	0	0
- Response To Markets	3	2	3	2	3	3	3	3	2	2
- Clustering Benefits	0	1	0	0	2	1	2	2	0	0
- Funding Potential	2	2	0	1	2	1	3	1	2	2
4. ENVIRONMENTAL IMPACTS	0	0	0	0	-1	0	0	0	0	0
5. COMMUNITY IMPACT										
- Impact On Lifestyle	2	1	-1	0	0	0	0	0	0	0
- Resident Recreation Opport.	0	0	0	2	0	0	0	0	0	0
- Economic	2	1	2	0	2	2	2	3	1	2
6. PROJECT POTENTIAL										
- Expected Viability	2	1	3	0	1	2	2	3	1	0
- Local Investment Opportunities	3	0	2	0	0	2	0	2	0	2
- Infrastructure Costs to Communities	-2	0	-2	0	0	-1	-1	-1	-1	-1
	28	19	22	8	24	23	29	33	12	21

OPPORTUNITY EVALUATION MATRIX

FOOD SERVICES

	Fishermans Village Restaurant Tofino	Harbour Quay Restaurant - Port Alberni	MacMillan Island Exhibit Food Service	Boardwalk Cafe - Bamfield
1. IMPACT ON STRATEGY				
- Extend Shoulder Season	2	2	1	0
- Extend Year-Around Tourism	0	0	0	0
- Increase Volume	1	1	0	1
- All Weather Facility	1	1	2	2
2. IMPACT ON ECONOMY				
- Job Creation (Overall)	1	1	1	1
- Student Employment	2	1	1	1
- Diversify Economy	1	0	0	0
- Generate Income	1	1	1	1
- Generate Local Taxes	1	1	1	1
- Job Training	1	0	0	0
3. IMPACT ON REGIONAL TOURISM				
- Integration With Existing Plant	2	2	1	1
- Impact On Competition	-2	-1	0	0
- Response To Markets	2	2	1	1
- Clustering Benefits	3	3	3	2
- Funding Potential	0	1	1	0
4. ENVIRONMENTAL IMPACTS	0	0	0	0
5. COMMUNITY IMPACT				
- Impact On Lifestyle	0	0	0	0
- Resident Recreation Opport.	1	2	0	1
- Economic	1	2	1	1
6. PROJECT POTENTIAL				
- Expected Viability	2	2	1	1
- Local Investment Opportunities	2	3	2	1
- Infrastructure Costs to Communities	-1	-2	-1	-1
	21	22	16	14

OPPORTUNITY EVALUATION MATRIX

ENTERTAINMENT

	Little Theatre - Ucluelet Tofino Port Alberni	Films, Video etc.	Major Special Event	Expanded Community Events; Sports/ Cultural etc.	Educational Workshops
1. IMPACT ON STRATEGY					
- Extend Shoulder Season	2	2	2	2	3
- Extend Year-Around Tourism	0	0	1	1	1
- Increase Volume	1	1	2	2	2
- All Weather Facility	3	3	3	3	3
2. IMPACT ON ECONOMY					
- Job Creation (Overall)	2	1	1	1	1
- Student Employment	2	1	1	1	1
- Diversify Economy	1	0	0	0	0
- Generate Income	1	0	2	2	2
- Generate Local Taxes	1	0	1	2	1
- Job Training	1	0	0	1	2
3. IMPACT ON REGIONAL TOURISM					
- Integration With Existing Plant	3	2	3	3	3
- Impact On Competition	0	0	0	0	0
- Response To Markets	2	2	2	2	2
- Clustering Benefits	2	2	2	2	1
- Funding Potential	1	1	2	1	1
4. ENVIRONMENTAL IMPACTS	0	0	0	0	0
5. COMMUNITY IMPACT					
- Impact On Lifestyle	1	1	1	0	0
- Resident Recreation Opport.	2	2	3	2	2
- Economic	2	2	2	2	1
6. PROJECT POTENTIAL					
- Expected Viability	1	1	1	1	2
- Local Investment Opportunities	0	1	2	1	2
- Infrastructure Costs to Communities	0	0	-1	-1	0
	28	22	30	28	30

	Instrument Landing Equipment Tofino Airport	Scheduled transportation between Ucluelet, National Park, Airport, Tofino	Package tours to Region	Staging area for boat tours throughout the coast	Acquire Airport (Port Alberni)
1. IMPACT ON STRATEGY					
- Extend Shoulder Season	2	3	3	2	1
- Extend Year-Around Tourism	1	1	2	0	0
- Increase Volume	1	2	3	2	1
- All Weather Facility	2	2	0	1	0
2. IMPACT ON ECONOMY					
- Job Creation (Overall)	1	1	2	1	1
- Student Employment	0	1	2	1	1
- Diversify Economy	2	0	2	1	2
- Generate Income	1	1	2	1	1
- Generate Local Taxes	1	1	2	1	2
- Job Training	1	0	1	0	0
3. IMPACT ON REGIONAL TOURISM					
- Integration With Existing Plant	3	3	3	3	3
- Impact On Competition	0	0	0	0	0
- Response To Markets	2	2	3	2	2
- Clustering Benefits	1	2	2	2	0
- Funding Potential	3	1	0	1	2
4. ENVIRONMENTAL IMPACTS	0	0	0	0	0
5. COMMUNITY IMPACT					
- Impact On Lifestyle	0	0	0	0	0
- Resident Recreation Opport.	0	1	0	0	0
- Economic	3	2	3	2	2
6. PROJECT POTENTIAL					
- Expected Viability	0	1	3	0	0
- Local Investment Opportunities	0	2	2	0	1
- Infrastructure Costs to Communities	0	0	0	-1	-3
	24	26	35	19	16

OPPORTUNITY RATING

Harbour Quay - Port Alberni	44
Fishermans Village - Tofino	43
Destination Resort(s)	33
Native Cultural Museum	32
Craft Festival	32
MacMillan Island Exhibit	30
Major Special Event	30
Educational Workshops	30
Christie Residence Accommodation	29
Community Events	29
Summer Theatre	28
Campground - Bamfield	27
Canadian Princess Resort	25
Underwater - Marine Exhibit	25
Lady Rose II	24
Pacific Rim National Park Campground	24
Municipal Campground - Port Alberni	22
Upgrading of Cox Bay Campground	22
Seasonal Accommodation - Bamfield	22
Harbour Quay Restaurant	22
Films/Video	22
Fishermans Village Restaurant	21

UNDERWATER INTERPRETATION EXHIBIT

APPENDIX II